

Sunset Public Hearing Questions for  
**Compact for Education**  
Created by Section 49-12-201, *Tennessee Code Annotated*  
(Sunset termination June 2010)

***Response submitted by the Education Commission of the States***  
***July 29, 2009***

- 1. Provide a brief introduction to the Compact for Education, including information about its mission, purpose and duties. Who, in Tennessee, has primary responsibility for execution of provisions of the compact?**

*The Compact for Education, which created the Education Commission of the States (ECS), was enacted by Tennessee in 1967. The original idea behind ECS, in the words of co-founder Terry Sanford, was to create a mechanism for the states “to do together what they could not do near so well alone.” Since its inception, ECS has been at the forefront of the efforts of states to improve education.*

*As stated in Tennessee statute, the specific purpose of the compact is fourfold:*

- 1. Establish and maintain close cooperation and understanding among executive, legislative, professional, educational and lay leadership on a nationwide basis at the state and local levels.*
- 2. Provide a forum for the discussion, development, crystallization and recommendation of public policy alternatives in the field of education.*
- 3. Provide a clearinghouse of information on matters relating to educational problems and how they are being met in different places throughout the nation, so that the executive and legislative branches of state government and local communities may have ready access to the experience and record of the entire country, and so that both lay and professional groups in the field of education may have additional avenues for the sharing of experience and the interchange of ideas in the formation of public policy in education.*
- 4. Facilitate the improvement of state and local educational systems so that all of them will be able to meet adequate and desirable goals in a society that requires continuous qualitative and quantitative advancements in educational opportunities, methods and facilities.*

*The Education Commission of the States is a nonprofit, nonpartisan organization with offices in Denver, Colorado. Member states are represented on the Commission by seven commissioners: usually, as in the case of Tennessee, the Governor, two legislators appointed by their respective houses, and four public members appointed by the Governor, one of whom is the head of a state agency or institution with responsibility for education.*

*ECS is chaired by a governor who serves a two-year term, and the chairmanship alternates between political parties. The 2008-10 chair is Governor Tim Pawlenty of Minnesota. The ECS vice-chair is a legislator of the opposite political party to the chair - currently Assemblywoman Barbara Clark of New York. The treasurer is an ECS Commissioner - currently Dr. Richard Rhoda, Executive Director of the Tennessee Higher Education Commission.*

**ECS Mission:**

*The Education Commission of the States (ECS) is the only nationwide, nonpartisan organization that brings together key leaders - governors, legislators, chief state school officers, higher education officials, business leaders and others - to work side by side to improve education at all levels.*

*ECS was established in 1965, by state leaders for state leaders. For more than 40 years, ECS has been helping policymakers improve public education by facilitating the exchange of information and ideas across states. A nonprofit interstate compact with 371 commissioners from its member states, ECS is the leading nonpartisan source of information, ideas and leadership on education policy. It tracks trends, translates research, provides advice and creates opportunities for state leaders to learn from one another.*

*The ultimate purpose of ECS is to help states improve student learning and achievement. Today, more than ever, it is vital for states to learn from and build on the experience of one another.*

**ECS Duties:**

***ECS Conducts Policy Research & Analysis***

*Staff specialists and senior staff help state leaders understand and develop policy for pre-kindergarten through postsecondary education in pivotal areas such as accountability, early learning, finance, governance, leadership, citizenship and teaching quality.*

***ECS Convenes State, Regional & National Policy Conferences***

*Through seminars, workshops and conferences - including The National Forum on Education Policy - ECS brings together policymakers and educators to share ideas and learn from one another, as well as experts from across the country.*

***ECS “Connects the Dots” Across the Policy Landscape***

*Education doesn’t operate in a vacuum. ECS is prepared to work with state leaders in aligning education policy across all levels and with any state sectors that have an impact.*

***ECS Promotes Networks & Partnerships***

*By developing a number of networks and partnerships involving legislators, legislative aides, governor’s aides and other key stakeholders, ECS promotes the sharing of information, ideas and resources at the state and national levels.*

### ***ECS Provides Information & News***

*ECS maintains the nation's most extensive Web site devoted to education policy. It features comprehensive packages of information on a growing number of early learning, K-12 and postsecondary issues, ranging from broad overviews to in-depth policy analyses. Policymakers can access the comprehensive collection of material through online and print publications as well as through customized, quick-turnaround searches by ECS policy staff.*

### ***ECS Customizes Technical Assistance***

*ECS tailors its services to individual states' needs, interests and resources to help leaders make the decisions right for their state. Services include policy audits, legislative testimony, research, meetings, consultation and advice.*

*The primary person responsible for execution of the provisions of the compact is the steering committee member. This person is one of seven ECS commissioners in Tennessee and serves on the ECS steering committee. The steering committee votes on matters such as the ECS budget, annual report and other business matters that need attention between meetings of the full commission. The current steering committee member for Tennessee is Richard Rhoda.*

## **2. Who are Tennessee's representatives on the Education Commission of the States created in Article III, Section A. of the compact?**

*The current ECS Commissioners from Tennessee are:*

*Governor Phil Bredesen  
Gloria Bonner  
Sen. Dolores Gresham  
Margaret Horn  
Richard Rhoda  
Timothy Webb  
Rep. Leslie Winningham*

*Ex officio  
Governor appointment, 7/1/2003  
Senate appointment, 3/19/2009  
Governor appointment, 3/13/2009  
Governor appointment, 7/1/2003  
Governor appointment, 4/1/2008  
House appointment, 2/23/2005*

## **3. What other states have entered into the compact with Tennessee?**

*Currently 49 states (all but Washington), American Samoa, the District of Columbia, Puerto Rico and the Virgin Islands are members of the compact for education.*

## **4. Have any party states withdrawn from the compact or filed notice of their intentions to withdraw under the provisions of Article VIII(D)? If so, which states and what were their stated reasons for withdrawing?**

*Washington withdrew from the compact in 1994 for an unknown reason.*

*Two states have filed notice of their intention to withdraw. Utah notified ECS of their intent to withdraw from the compact in 2007 for fiscal reasons; however, they did not complete the withdrawal process. They have postponed their withdrawal and are seeking to reengage with ECS. Maine notified ECS of their intent to withdraw in 2007 for fiscal reasons; however they did not complete the withdrawal process and have continued to be engaged with ECS.*

- 5. How is the compact funded? What were the compact's revenues (by source) and expenditures (by object) for fiscal years 2008 and 2009? What is the cost to Tennessee for the state to participate in the compact and what types of expenses are involved? Have the commission's revenues and expenditures been audited annually by a qualified public accountant as required by Article VII, Section D of the compact?**

*ECS is funded from annual fees paid by the member states, according to a schedule determined by the Commission, and grants and contracts from national foundations. ECS also receives miscellaneous revenue from corporate sponsorships and registration fees.*

*The state fee for Tennessee in FY2008 and FY2009 was \$77,300 each year.*

*ECS' revenues and expenditures are audited annually by a qualified public accountant. The audited report is submitted to the commission.*

- 6. How many times has the Education Commission of the States, created by Article III of the compact, met during fiscal years 2008 and 2009? Which representatives from Tennessee attended these meetings? Are minutes of these meetings kept? Who keeps the official minutes? How much per diem or travel reimbursement was associated with this activity?**

*The Education Commission of the States met July 1, 2008 and July 8, 2009. Minutes are taken for each meeting and kept by the ECS staff associate for governance and committee relations. Minutes are distributed and approved at the subsequent ECS meeting.*

*It is ECS' policy to reimburse steering committee members for their travel to ECS meetings.*

*The ECS Commissioner from Tennessee present at the 2008 meeting was Richard Rhoda. Other participants at the 2008 meeting were: Mary Jo Howland, Tennessee State Board of Education and Connie Smith, Tennessee Department of Education.*

*ECS Commissioners from Tennessee present at the 2009 meeting were: Governor Phil Bredesen, Margaret Horn, Richard Rhoda, Sen. Dolores Gresham and Timothy Webb.*

*Other participants from Tennessee at the 2009 meeting were:*

Marylou	Apple	Motlow State Community College
William	Badley	Middle Tennessee State University
Mary	Bassett	Jackson State Community College
Robert	Bell	Tennessee Tech University
Treva	Berryman	Tennessee Board of Regents
Karen	Bowyer	Dyersburg State Community College
Deborah	Boyd	Lipscomb University
Dane	Boyington	Thinking Media
Sheila	Boyington	Thinking Media
Tommie	Brown	Tennessee General Assembly

Luajean	Bryan	Walker Valley High School
Miles	Burdine	Kingsport Chamber of Commerce
Susan	Burns	National Center on Performance Incentives
Matt	Caldwell	WIN (Worldwide Interactive Network)
Teresa	Chasteen	WIN (Worldwide Interactive Network)
Jimmy	Cheek	University of Tennessee
Kay	Davenport	Smyrna West Alternative School
Tisa	Day	Isaac Lane Technology Magnet School
Beth	Fortune	Vanderbilt University
Catherine	Gardner	National Center on Performance Incentives
Michael	Gragg	WIN (Worldwide Interactive Network)
Rich	Haglund	Tennessee State Board of Education
Nathan	James	Tennessee Senate
Karin	Katterfeld	Vanderbilt University
Lillian	Kellogg	Education Networks of America
Joni	Lenig	Columbia State Community College
Charles	Manning	Tennessee Board of Regents
Candice	McQueen	Lipscomb University
Peter	Millet	Tennessee State University College of Education
John	Morgan	State of Tennessee
Shirley	Raines	The University of Memphis
Thomas	Rakes	University of Tennessee at Martin
David	Sevier	Tennessee State Board of Education
Paula	Short	Tennessee Board of Regents
Jan	Simek	University of Tennessee
W. Patrick	Smith	Southern Strategy Group
Margaret	Smith	Columbia State Community College
Elaine	Swafford	Chattanooga State Tech Community College
JoAnne	Thomasson	Pellissippi State Technical Community College
Johnnie	Watson	LeMoyne-Owen College
David	Wright	Tennessee Higher Education Commission

**7. Do the Tennessee representatives meet to confer other than at commission meetings? If so, what records are kept of these meetings and by whom?**

*We are unaware of any other meetings convened by Tennessee commissioners.*

- 8. Was a steering committee formed to conduct compact business when the full commission is not meeting as authorized by Article VI, Section A? If yes, which representatives from Tennessee serve on the steering committee? If no representative from Tennessee is currently serving on the steering committee, who was the last member to serve and when?**

*A steering committee was formed. One ECS commissioner in each state serves as the steering committee representative. Richard Rhoda serves as the steering committee member for Tennessee; he also serves as the ECS treasurer for the 2008-10 term.*

*In addition to ECS' annual meeting, ECS convenes smaller steering committee meetings each year. There were two such meetings in FY2008 (April and November). In April, ECS Commissioner Richard Rhoda attended. In December, ECS Commissioners Richard Rhoda and W. Patrick Smith attended. Thus far in FY2009 there was one meeting in April. ECS Commissioners Richard Rhoda and Margaret Horn attended.*

- 9. What other advisory and technical committees have been formed as authorized by Article VI, Section B? Are representatives from Tennessee serving on these committees? If no representatives from Tennessee are currently serving on these committees, who were the last members to serve on advisory or technical committees and when?**

*ECS currently has no other advisory or technical committees formed under the terms of Article IV, Section B.*

- 10. Has the commission made annual reports to the Governor and General Assembly regarding its activities as required by Article III, Section J of the compact? When was the most recent annual report published? What other reports are prepared in conjunction with the operations and activities of the compact, and who receives the reports? Describe any reports and attach copies of any reports issued during fiscal years 2008 and 2009.**

*ECS publishes annual reports and makes them readily available to ECS commissioners and anyone who visits our website. The most recent annual report was published in May 2009. ECS mails a copy of the annual report to ECS Commissioners who register for the annual meeting. (Specifically, the 2008 annual report was sent to Governor Phil Bredesen, Margaret Horn, Senator Dolores Gresham, Richard Rhoda and Tim Webb.) We also send an electronic version to all commissioners. Furthermore, we post an electronic copy of the report on our website for anyone to access.*

*A copy of our 2008 annual report is attached. Because our fiscal year follows the calendar year, our 2009 annual report will not be available until 2010.*

*An official audit report is prepared by ECS' auditors in the spring of each year. The ECS Finance Committee and ECS Executive Committee receive a copy of the audit report. We also provide a copy to any commissioner who requests one.*

*A copy of our 2008 audit report is included. The 2009 audit report will not be available until early 2010.*

**11. What were the commission’s major accomplishments during fiscal years 2008 and 2009? Specifically, describe the nature and extent of commission activities within each of the six powers enumerated in Article IV of the compact. What recommendations has the commission made during fiscal years 2008 and 2009 to agencies and officials of Tennessee regarding the improvement of public education? What, if any, actions have been taken based on these recommendations?**

*ECS is the only nationwide nonpartisan interstate compact devoted to education.*

- *ECS conducted research and policy analysis in areas such as accountability, citizenship, early learning, finance, governance, and teacher quality and leadership, to help leaders understand and develop policy for preschool to postsecondary education and workforce development*
- *ECS created and maintains unique, 50-state databases for: Pre-Kindergarten, Kindergarten, Artscan (Arts Education), Charter Schools, School Choice, Citizenship Education (NCLC), Highly Qualified Teachers, Paraprofessionals, K-12 Governance Structures, Leadership Policy, Reading/Literacy, NCLB Reauthorization, Diversified Teacher Compensation Programs, Teacher Recruitment & Retention, Special Education Teacher Certification & Licensure, Teacher Certification & Licensure, Teacher Professional Development State Policy, Postsecondary Education Governance Structures, Teacher Preparation State Policy, High School Policy (includes databases on the following topics: Adolescent Literacy, Advanced Placement, Career & Technical Education, College-Ready Standards, Dual Enrollment, Early/Middle College High Schools, Exit Exams, Graduation Rates, High School/College Alignment, High School-Level Accountability, High School-Level Assessment, Highlights of Local Initiatives, International Baccalaureate, P-16/P-20 Councils, Postsecondary Feedback Systems, Special Populations in High School Assessments, State Data Systems, State Initiatives to Improve High Schools, STEM, Student Accountability, Student Support & Remediation and Virtual High Schools*
- *ECS provided access to high-level state education policymakers – Governors, legislators, chiefs, higher education and others*
- *ECS convened state, regional, and national policy conferences and meetings*
- *ECS “connects the dots” across the policy landscape by highlighting the impact policies in the areas of social services, labor and employment, corrections and public health can have on the success of education policy, and encouraging state leaders to align these other policies with the goals of their education agenda*
- *ECS maintained the nation’s most extensive Web site devoted to education policy with information ranging from brief overviews to in-depth policy analyses*
- *ECS promoted networks and partnerships between and among states*

- *ECS provided customized technical assistance, such as policy audits, legislative testimony, research, meetings, consultations and advice*
- *March 26-27, 2009, the ECS Teacher Quality and Leadership Team met in Denver, Colorado. This unique team, made up of policy experts, business leaders, educators and practitioners, was created to:*
  - *Identify potential reasons why previous approaches to improving teacher quality have fallen short*
  - *Identify a “short list” of specific drivers for change*
  - *Craft a set of principles that under gird these drivers*
  - *Suggest how various means of technology might accelerate change.*
- *June 28-30, 2009 ECS partnered with Microsoft Corporation and International Society for Technology in Education (ISTE) to host the **Global Education Competitiveness Summit** in Washington, D.C. The summit brought together decisionmakers and policymakers at the state level to talk about opportunities for American students and to increase the level of global competitiveness. At the two-day summit, state teams and policy leaders from around the world discussed specific steps to boost student achievement and U.S. competitiveness, including new ways to ensure students have the skills and support needed to succeed in today’s globally competitive economy. Outcomes from the meeting included:*
  - *Exploring how states can improve the quality of education in schools through 21st century assessment transformation and learning environment renewal*
  - *Exposing policy and legislative leaders in states to world best practices and thinking*
  - *Exploiting the current global focus on international benchmarking initiatives to drive change at national, state, school and classroom levels in U.S. education.*
  - *Identifying a small number of states to embark on multi-stakeholder partnerships for education transformation*
- *July 8-10, 2009 the ECS National Forum on Education Policy was held in Nashville, Tennessee. The forum focused on how education can be an engine to ignite the economy. Whether states are challenged by making the shift from early learning to the early grades or from middle school and high school to college and career preparation — the 2009 ECS National Forum on Education Policy program was developed to provide answers. This year’s forum featured more than 30 sessions — highlighted by powerful dialogues and deep discussions on a broad spectrum of current education challenges. Plenary speakers included:*
  - ***Clayton M. Christensen**, the Robert and Jane Cizik Professor of Business Administration at the Harvard Business School, author of *Disrupting Class* (2008)*
  - ***Richard Elmore**, Gregory R. Anrig Professor of Educational Leadership at Harvard University*
  - ***Uri Treisman**, Executive Director of the Charles A. Dana Center and professor of mathematics and of public affairs at the University of Texas, Austin*
  - ***Kati Haycock**, President, Education Trust.*



*ECS also was proud to honor the following at the 2009 National Forum on Education Policy:*

- *The **State of Tennessee**, under Governor Phil Bredesen's leadership, was awarded the 2009 Frank Newman Award for State Innovation. Governor Phil Bredesen accepted the award.*
- ***Kati Haycock**, President of the Education Trust, was awarded the James Bryant Conant Award for Outstanding Contributions to American Education.*
- ***Project Lead the Way** was awarded the ECS Corporate Award for their commitment to and investment in improving public education.*

*The 2008 ECS award recipients included:*

- *The **State of North Dakota** was awarded the 2008 Frank Newman Award for State Innovation. Lt. Governor Jack Dalrymple accepted the award.*
- ***Ron Wolk**, Chairman of the Big Picture Company and former editor of Education Week, was awarded the James Bryant Conant Award for Outstanding Contributions to American Education.*
- ***Simon Youth Foundation** was awarded the ECS Corporate Award for their commitment to and investment in improving public education.*

*For more highlights and accomplishments, please see the attached documents:*

- *2008 ECS Annual Report*
- *2008 ECS Publications, Databases and Convenings*

*The five priority areas for ECS in 2009 are:*

1. *Benchmarking to international standards*
2. *P-20 systems development and alignment*
3. *Aligning education to the workforce*
4. *Improving building-level leadership (principals)*
5. *Developing, implementing and using longitudinal data systems to improve student achievement*

**12. Describe any items related to the compact that require legislative attention and your proposed legislative changes.**

*We have no recommendations and defer to the Tennessee representatives on the commission.*

**13. Should Tennessee's participation in the compact be continued? To what extent and in what ways would the absence of the compact affect the public health, safety or welfare?**

*Yes! Tennessee's participation in the compact should be continued. States face a critical time in history when they must step up and meet the challenges of global competitiveness in education and the workforce, or face the consequences. To ensure that all students are prepared to succeed in school and beyond, states need to know what other states and countries are doing and what is succeeding, so precious time is not spent re-inventing the wheel. States need access to updated information, policy implications and model policies to address shortcomings in our current education systems and/or to accelerate progress with education policies and strategies that are yielding results in and across state lines. The great*

*progress and innovation demonstrated in Tennessee adds strength to the ECS compact and accelerates progress for all states including Tennessee.*

*ECS is a “shortcut” to education policies, information and resources. Here’s how ECS can move states’ education agendas forward:*

- *ECS provides ongoing, daily staff work that results in new and updated information on virtually all education policy topics for immediate use in states to help forward their education agendas.*
- *Immediate access, by phone, e-mail or in person, to ECS staff expertise, data, experience in the areas of: School Finance, Workforce Development, Postsecondary Education, High School Reform, P-16/P-20 Councils, Education Policy, Service-Learning and Citizenship, Teaching Quality and Leadership, Early Childhood Education, International Benchmarking, ECS Clearinghouse Information and Databases, etc. **ECS staff members work FOR the states.***
- *ECS has an established communication system with high-level education policymakers from all states and U.S. Territories.*
- *ECS staff members testify at state legislative meetings to inform and to support states’ education initiatives.*
- *ECS staff members provide on-site training to state policymakers, legislators and their staffs, state boards of education, etc. on a variety of educational topics pertinent to states’ education agendas.*
- *e-Clips - daily summaries of and links to education articles, reports, studies and policies.*
- *e-Connections - weekly reports of what other states are doing, good reads, names in the news, and other helpful web sites.*
- *Progress of Education Reform- articles throughout the year focusing on major education policy topics, summarizing current best thinking and practice.*
- *StateNotes and Policy Briefs - ECS regularly issues useful compilations, summaries and/or comparisons of state policies — enacted or pending — on a wide variety of education topics.*
- *National Center on Learning and Citizenship (NCLC) - NCLC organizes national, statewide and local meetings to share information about effective service-learning and use of school volunteers. These forums provide participants an opportunity to highlight service-learning and volunteer programs, showcase student success in service-learning and discuss challenges they face in providing high-quality education linked to community service for K-12 students. In addition, NCLC hosts a meeting of P-16 education leaders who are committed to revitalizing the civic mission of schools.*

- *ECS Research Studies Database - summarized findings, results, policy implications and recommendation on recent high-powered educational research studies.*
- *ECS grant projects that include working with specific states on their education priorities*
- *One Annual National Forum on Education Policy*
- *One Annual ECS Steering Committee Meeting*
- *Regional meetings, by request, to pull states' education policymakers together to address education policy priorities in specific regions*
- *Summaries of states' policy and legislative actions related to educational topics and priorities, links to legislative and regulatory language, and the status of the policy or legislative action. ECS visits other states, provides technical assistance and presents information to a variety of state and national organizations, including State Legislatures, P-16 Councils, Postsecondary Institutions, upon request, to further states' education agendas.*
- *ECS has created a Teaching Quality Strategy Team, comprised of national experts in the fields of education, research, science and technology, and business. This team will determine the TQ policies and strategies that will improve teaching quality, leadership and student achievement and that can be brought to scale across our states.*

**14. Please list all compact programs or activities that receive federal financial assistance and, therefore are required to comply with Title VI of the Civil Rights Act of 1964. Include the amount of federal funding received by program/activity.**

*Currently, none of ECS' programs or activities receives federal funding.*

*If the compact does receive federal assistance, please answer questions 15 through 23. If the compact does not receive federal assistance, proceed directly to question 22.*

- 15. Does the compact prepare a Title VI plan? If yes, please provide a copy of the most recent plan.**
- 16. Does the compact have a Title VI coordinator? If yes, please provide the Title VI coordinator's name and phone number and a brief description of his/her duties. If not, provide the name and phone number of the person responsible for dealing with Title VI issues.**
- 17. To which state or federal agency (if any) does the compact report concerning Title VI? Please describe the information the compact submits to the state or federal government and/or provide a copy of the most recent report submitted.**
- 18. Describe the compact's actions to ensure that compact staff and clients/program participants understand the requirements of Title VI.**

- 19. Describe the compact's actions to ensure it is meeting Title VI requirements. Specifically, describe any compact monitoring or tracking activities related to Title VI, and how frequently these activities occur.**
- 20. Please describe the compact's procedures for handling Title VI complaints. Has the compact received any Title VI-related complaints during the past two years? If yes, please describe each complaint, how each complaint was investigated, and how each complaint was resolved (or, if not yet resolved, the complaint's current status).**
- 21. Describe how the compact ensures that minorities are included in needs assessments or any other discussions regarding program needs.**
- 22. Please provide a breakdown of current compact staff by title, ethnicity, and gender.**

<b>Name</b>	<b>Title</b>	<b>Ethnicity</b>	<b>Gender</b>
Roger Sampson	President	White/Caucasian	Male
Antionette Garcia	Exec. Assistant	Hispanic	Female
Kathy Christie	Chief of Staff	White/Caucasian	Female
Tracy Vigil	Controller	White/Caucasian	Female
Mary Guidotti	Accountant, Payroll	White/Caucasian	Female
Maggie Catalano	Accounts Payable Specialist	White/Caucasian	Female
John Ivey	Publications and Distribution Coordinator	White/Caucasian	Male
Karen Kepler	Assoc. National Forum and Events Manager	White/Caucasian	Female
Heidi Normandin	Staff Associate, Governance and Committee Relations	White/Caucasian & Native American	Female
Mary Ann Strombitski	Director, Communications	White/Caucasian & Native American	Female
Kym Bloom	Print/Web Editor	White/Caucasian	Female
Ashley Zaleski	Communications/Media Specialist	White/Caucasian	Female
Melodye Bush	Researcher	White/Caucasian	Female
Jennifer Dounay	Sr. Policy Analyst	White/Caucasian	Female
Mary Fulton	Policy Analyst	White/Caucasian	Female
Michael Griffith	Sr. School Finance Analyst	White/Caucasian	Male
Carol Kreck	Document Management	White/Caucasian	Female
Molly Ryan	Researcher	White/Caucasian	Female
Kyle Zinth	Asst. Policy Analyst	White/Caucasian	Male
Barbara Thompson	Project Leader, Teacher Quality and State Relations Director	White/Caucasian	Female
Mimi Howard	Director, Early Learning	White/Caucasian	Female
JoAnn Henderson	Executive Director, National Center for Learning and Citizenship	White/Caucasian	Female
Lisa Ann Guilfoile	Project Leader	White/Caucasian	Female
Jennifer Piscatelli	Asst. Policy Analyst	White/Caucasian	Female
Ann Rautio	Asst. Researcher	White/Caucasian	Female
Bruce Vandal	Director, Postsecondary Education and Workforce Development	White/Caucasian	Male
Kristine Maloney	Researcher	White/Caucasian	Female
Noe Cisneros	Intern	Hispanic	Male

**23. Please list all compact contracts, detailing each contractor, the services provided, the amount of the contract, and the ethnicity of the contractor/business owner.**

<b>2008 Subcontractors</b>			
Name	Description of Work	Amount	Ethnicity
Cross and Joftus	State Relations Networking	\$57,750.00	Unknown
McCalls E2E	IT Services – Specific to Database development and Infrastructure	\$85,055.00	Indian
Mission Critical	IT Services – Specific to Maintenance	\$57,588.58.00	Unknown
Joanne Wilkins	IT Services – Specific to Database development and conversion	\$68,568.50	Unknown
Salesforce.com	IT Services – Specific to Database	\$9,500.00	Unknown
Third Mile Group	Regional Meeting Planning, Teacher Quality and Leadership Initiative	\$8,623.48	White/Caucasian
Whiteley Educational Consulting	Special Projects	\$7,500.00	Unknown
Jessica McMaken	Early Learning Policy Work	\$700.00	Unknown
Knowledge In the Public Interest	Postsecondary Project Work	\$12,500.00	Unknown
Kristie Kauerz	Early Learning Policy Work	\$1,600.00	Unknown
<b>2009 Subcontractors</b>			
Jessica McMaken	Early Learning Policy Work	\$2,940.00	Unknown
Joanne Wilkins	IT Services – Specific to Database development and conversion	\$26,877.50	Unknown
Knowledge In the Public Interest	Postsecondary Project Work	\$56,500.00	Unknown
Kristie Kauerz	Early Learning Policy Work	\$4,800.00	Unknown
Salesforce.com	IT Services – Specific to Database	\$5,250.00	Unknown
Strategic Partnership, LLC	Networking, Relationship Development and Fundraising	\$29,531.13	Unknown
The Ferrell McDaniel Company	National Forum Fundraising	\$0.00	Unknown
Third Mile Group	Regional Meeting Planning, Teacher Quality and Leadership Initiative	\$6,600.00	Unknown
University of Massachusetts	Postsecondary Project Work	\$0.00	Unknown
Whiteley Educational Consulting	Special Projects	\$28,125.00	Unknown

2008 ECS  
ANNUAL  
REPORT

# Big Ideas Power Education



Education Commission  
of the States



# WHAT WE DO

Enlighten



Equip



Engage



ECS is the only nationwide, nonpartisan interstate compact devoted to education at all levels.

The mission of the Education Commission of the States is to help states develop effective policy and practice for public education by providing data, research, analysis and leadership; and by facilitating collaboration, the exchange of ideas among the states and long-range strategic thinking.

- ➔ Conduct policy research and analysis
- ➔ Convene state, regional and national policy conferences
- ➔ “Connect the dots” across the policy landscape
- ➔ Promote networks and partnerships
- ➔ Provide information and news
- ➔ Customize technical assistance

## 2008 ECS Publications List

Check out all of the products generated by the Education Commission of the States in 2008! This impressive collection includes direct links to publications, databases and a sampling of key research studies.

[www.ecs.org/2008ECSPubs.pdf](http://www.ecs.org/2008ECSPubs.pdf)

2008-10 ECS Chair, Minnesota Governor Tim Pawlenty accepts the gavel from 2006-08 ECS Chair and former Kansas Governor Kathleen Sebelius, now Secretary, U.S. Department of Health & Human Services.



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## CHAIRMAN'S LETTER

# Dear Colleagues,

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Ensuring that our nation's children are prepared to tackle the challenges of the 21st Century is more important than ever. The Education Commission of the States is taking a leadership role in focusing the nation's attention on education reform and the development of policy based on research and proven strategies.

As a governor, chair of ECS, co-chair of Achieve Inc. and former chair of the National Governors Association, I am deeply committed to improving the American education system. In my own state, we have taken steps to support international benchmarking, alignment of programs from early learning through higher education, and improving the link between education and workforce needs.

Through Q Comp, Minnesota is leading the nation with an alternative pay schedule that compensates teachers based on performance, not just seniority. We have proposed a new initiative to provide intensive intervention for 8th graders struggling in math and reading to ensure they are ready for high school. Through our Mandarin Chinese Initiative, we are expanding the number of Chinese language courses offered in classrooms across the state. Overall, we have increased the rigor of academic standards and substantially increased participation levels in AP® and dual-credit courses.

ECS is working with education leaders to challenge every state and territory to:

- ✦ Benchmark internationally to measure student achievement
- ✦ Improve high school graduation and college attainment rates
- ✦ Prepare youth for college and workplace demands
- ✦ Do their part in aligning education and workforce needs.

Now is the time to put big ideas into action. ECS is working to do just that. Thank you for your efforts to strengthen the compact through your ideas, actions and engagement.

Sincerely,

Tim Pawlenty  
2008-10 Chair, Education Commission of the States  
Governor of Minnesota

“Now is the time to put big ideas into action. ECS is working to do just that.”

## PRESIDENT'S LETTER

# Dear Friends of ECS,

---

Education in America is truly powered by “big ideas.” During 2008 and continuing in 2009, the Education Commission of the States began pressing forward on a number of big ideas:

- ✦ Helping schools, districts and states benchmark to international standards
- ✦ Providing guidance on the development and alignment of P-20 systems
- ✦ Aligning education mastery and skills to workforce needs
- ✦ Improving building-level leadership
- ✦ Developing and implementing longitudinal data systems to inform instructional and policy decisions.



At the core of these “big ideas” is a desire to propel the nation’s students — including lifelong learners in the workforce and those sidelined by the economy — forward both in knowledge and application of skills. I believe these efforts will result in a more competitive America — better prepared to face our current global challenges.

To this end, ECS’ Postsecondary Education and Workforce Development Institute is working closely with policymakers, institution leaders, and business and community leaders to drive innovation and change across all levels of education to meet today’s challenges. Through a three-year \$1.4 million dollar grant from the Lumina Foundation, ECS will be working on how to fully leverage postsecondary developmental studies programs as a critical tool in state efforts to increase college attainment rates.

ECS released *From Competing to Leading: An International Benchmarking Blueprint* at the National Forum on Education Policy. *The International Benchmarking Toolkit*, released in early 2009, builds on the first report and is a unique resource for state policymakers, school district officials, principals and teachers looking to raise the bar in classrooms around the country.

Working in partnership, the W.K. Kellogg Foundation and ECS convened governors in five states, to host the Governor’s Forum on Linking Ready Kids and Ready Schools — statewide events focused on deepening understanding and developing policy to support transitions and alignment across early learning and the early grades.

Please take a few minutes to review our 2008 performance report. I believe you will find that ECS is playing a pivotal role in developing and acting on many “big ideas” in education to fully support states and territories in bolstering educational achievement for early learners through postsecondary and well beyond.

Best Regards,

A handwritten signature in black ink that reads "Roger Sampson". The signature is fluid and cursive, with a large, stylized 'R' and 'S'.

Roger Sampson  
President, Education Commission of the States

## EARLY LEARNING PROGRAM

The ECS Early Learning Program helps state leaders shape policy to build systems of support for young children from birth to age 8. It identifies critical and emerging issues as well as policy opportunities and translates research and practice into policy-focused analyses and recommendations. The Early Learning Program is designed to provide information, guidance and insight to help policymakers in addressing the broad spectrum of issues impacting the education of young children today.

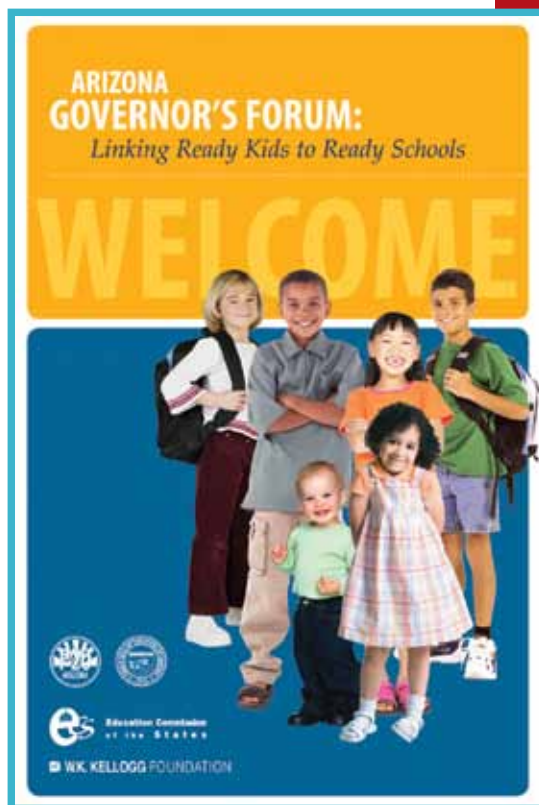


## ECS EARLY LEARNING ISSUE SITE: RETOOLING AND UPDATING

The ECS Early Learning issue site, a part of the ECS Web site, is a key source of information for education leaders who depend on its resources to assist them in policymaking decisions and to connect them to model practices and policies in other states. With a grant from the A.L. Mailman Foundation, the early learning site is being updated and retooled to reflect developments in the rapidly changing early learning policy environment. This redesign will create an issue site focused on policy impacting children from birth through age 8. Special attention to policy and practice for education in kindergarten and the early grades – a renewed Early Learning program priority – will be reflected in information and linkages on the redesigned issue site.

Future priorities for the Early Learning program include a focus on:

- ✦ The role kindergarten and the early grades play in shaping later student achievement
- ✦ The impact of the national political and economic situation on state policy for young children
- ✦ Continued work to identify policy and practice to effectively link early learning and K-12 education systems.



## SUPPORTING PARTNERSHIPS TO ASSURE READY KIDS (SPARK)

ECS is in its second year of work with the SPARK initiative funded by the W.K. Kellogg Foundation. SPARK was designed to build community capacity and partnerships among schools, agencies and families to assure that vulnerable children were ready for school and schools were ready for children. ECS provided the policy lens sites needed to identify opportunities to scale up best practice to policy. In 2007, ECS launched a strategy to leverage SPARK best practices to inform state and federal policy. Based on an analysis of initiative outcomes across all SPARK sites, a core set of policy targets emerged. These policies focus on building linkages across early care and education and schools through transition practices and aligning teaching and learning across systems. In 2008, this analysis resulted in a new round of activities to engage state and federal policymakers. Activities include:

- ✦ Disseminating a series of briefs and program profiles on SPARK best practices and policy opportunities
- ✦ Co-convening governors in five states to host the Governor's Forum on Linking Ready Kids and Ready Schools — statewide events focused on policy to support transitions and alignment across early learning and the early grades
- ✦ Facilitating a professional learning community of leaders from the five Governor's Forums to support and sustain state efforts to link early learning and the early grades
- ✦ Co-convening a national policy forum where findings and policy recommendations from SPARK and the Governors' Forums were released to state and federal policymakers and members of the new Administration (Washington DC, March 30-31, 2009).

# HIGH SCHOOL POLICY CENTER

## 50-STATE POLICY INFORMATION

To provide a baseline of knowledge on what states are doing on key high school reform issues, HSPC staff released 50-state policy databases on:

- ✦ Dual Enrollment
- ✦ Early College/Middle College High Schools
- ✦ P-16 Councils
- ✦ High School-Level STEM Initiatives
- ✦ State Initiatives to Improve High School, including:
  - ✦ State subsidies for ACT, SAT, PLAN, PSAT, etc.
  - ✦ Initiatives to improve grade 9 and the senior year
  - ✦ Outreach
  - ✦ Initiatives that require students to create long-term plans (i.e., five-year plan, declaration of major, etc.)
  - ✦ State support for e-transcripts
- ✦ Postsecondary Feedback Systems
- ✦ Adolescent Literacy
- ✦ Career/Technical Education

Staff also updated the numerous state policy databases launched in 2006 and 2007. The HSPC draws the vast majority of information for state policy databases from primary sources, including state statutes, regulations, executive orders and other primary source documents, ensuring the highest level of quality and accuracy.

## TECHNICAL ASSISTANCE, PRESENTATIONS AND TESTIMONY

HSPC staff were called upon to provide feedback on proposed legislation, and to present to policymakers and other education audiences. Such occasions include presentations/testimony to:

- ✦ Colorado P-20 Council: College-readiness initiatives nationwide (February)
- ✦ New York Black and Hispanic Legislative Caucus: 6th grade dropout indicators (February)
- ✦ Hechinger Institute journalists: Math and science graduation requirements (May)
- ✦ California P-16 Council: P-16 and P-20 initiatives in the states (June)
- ✦ Inaugural Kansas P-20 council meeting: P-16 and P-20 initiatives in the states (July)
- ✦ State of Texas: College readiness indicators in high school assessments (September)
- ✦ Alaska legislators: P-20 and dropout prevention (October)
- ✦ MIND Research Institute Forum: Trends in math education in the states (October)
- ✦ Nevada Dropout Prevention Summit: State-level dropout prevention initiatives (November)
- ✦ ECS commissioners and other invitees: P-20 (December)

HSPC staff also participated in Colorado P-20 council deliberations on concurrent enrollment that influenced legislation introduced in the 2009 legislative session.



## RESEARCH STUDIES DATABASE

Studies on key high school topics were added to the ECS Research Studies database ([www.ecs.org/rs](http://www.ecs.org/rs)), a one-of-a-kind tool providing policymakers with anytime, anywhere access to jargon-free syntheses of high-quality academic research. All studies must have implications for state-level policy, include interventions with potential for replication, and be peer-reviewed or juried (though exceptions are made on a case-by-case basis).

## HIGHLIGHTS OF LOCAL INITIATIVES

To inform policymakers of successful and replicable high school reform approaches, the HSPC profiled innovative state- and district-level high school initiatives. These include the North East Independent School District (Texas) (teacher professional development, using data and student supports to improve achievement among students with disabilities), Florida 2006 H.B. 7087 (comprehensive—not “piecemeal” reform in key areas), the “Met” school in Providence, Rhode Island (serving at-risk students through an innovative model) and Boston’s Pilot Schools (changing urban approaches to school size, accountability and governance). To be included in this database, initiatives must meet specified criteria demonstrating the impact, sustainability and replicability of innovative efforts on behalf of traditionally underserved youth.

## HSPC PUBLICATIONS

In 2008, HSPC staff published analysis reports on:

- ✦ Dispelling the myths about the negative effects of raising graduation requirements
- ✦ Dropout recovery
- ✦ Early college high schools
- ✦ Improving college access for underserved students
- ✦ Successful middle school to high school transitions
- ✦ Landmines P-16/P-20 councils encounter — and how they can be addressed (or avoided altogether)
- ✦ Parental involvement at the high school level
- ✦ High school remediation
- ✦ Teacher professional development at the high school level

In addition HSPC staff completed an update of the *High School Agenda: Who’s Doing What* StateNote.

## EXTERNAL USE AND RECOGNITION

HSPC materials informed state policy deliberations on countless issues, and HSPC staff received numerous requests from local, state and national organizations to reprint or use HSPC products. Of note, Editorial Projects in Education, the publishers of *Education Week*, used the ECS database on P-16 and P-20 councils as a basis for tables in the June 2008 issue of its annual *Diplomas Count* supplement, and the Data Quality Campaign used the same database to populate a larger database on state P-16/P-20 efforts. ECS Senior Policy Analyst Jennifer Dounay was invited to participate in two *Education Week* online chats (on P-16/P-20 and math requirements at the high school level), authored a commentary on state P-16/P-20 councils for the June 2008 *Diplomas Count* and contributed to the development of the American Youth Policy Forum’s forthcoming compendium on college- and work-readiness programs. In 2008, Dounay also served on the technical panels for a U.S. Department of Labor grant on individual graduation plans and a National Science Foundation grant on math and science graduation requirements.

Links to the state policy databases, publications, research studies, highlights of local initiatives, and recent PowerPoint presentations are available on the ECS Web site at [www.ecs.org](http://www.ecs.org).



## WE MANAGE KNOWLEDGE.

Information Clearinghouse staff collect and manage information used for developing ECS databases, publications and the ECS Web site; providing technical assistance; and allowing us to quickly answer your questions. Our highly specialized library consists of more than 28,000 documents in digital format and approximately 90,000 in hard copy.

# INFORMATION CLEARINGHOUSE

## WE TRACK STATE POLICY ACROSS THE STATES.

In 2008, we searched out, screened, summarized and entered more than 2000 state education policy enactments into our state policy tracking database. This one-of-a-kind resource is updated weekly and currently includes more than 28,000 records. Users can access this database on the ECS Web site anywhere, anytime.

## WE FIND RESEARCH YOU CAN TRUST AND MAKE IT ACCESSIBLE TO YOU.

We seek out pertinent, credible research studies and ensure they meet our selection criteria. Then we provide bulleted findings and recommendations, itemize the key implications for policy, and enter them into our Web-based Research Studies Database.

## WE KNOW WHERE TO LOOK AND WE SHARE WHAT WE KNOW.

Clearinghouse staff members respond to approximately 95% of all questions coming to ECS within 24 hours. Based on 2008 numbers, the 10 strongest areas of your interest include: high school, finance, teaching quality, postsecondary, accountability, governance, attendance, safety, P-20, choice of schools and curriculum.

We posted more than 200 new resources (our own and other organizations') to [www.ecs.org](http://www.ecs.org) (nearly 8000 documents in total).

We provided school finance expertise to legislative committees in Arizona, New Hampshire, North Carolina and Virginia, to legislators attending the National Conference of State Legislatures' (NCSL) annual meeting, and wrote an article for the professional journal serving school business officials. We presented on state systems of value-added accountability to a Select Committee on Public School Accountability in Texas and at Ohio's Battelle for Kids conference. Staff also used "virtual" venues to provide expertise via teleconference with the Education Writers Association and with the business community through EdNet.

Clearinghouse staff members produce two electronic newsletters: ECS e-Clips (a daily compilation of news clips across the states) and ECS e-Connection (a weekly compilation of key initiatives across the states, new ECS publications and other good reads).

## WE COLLABORATE.

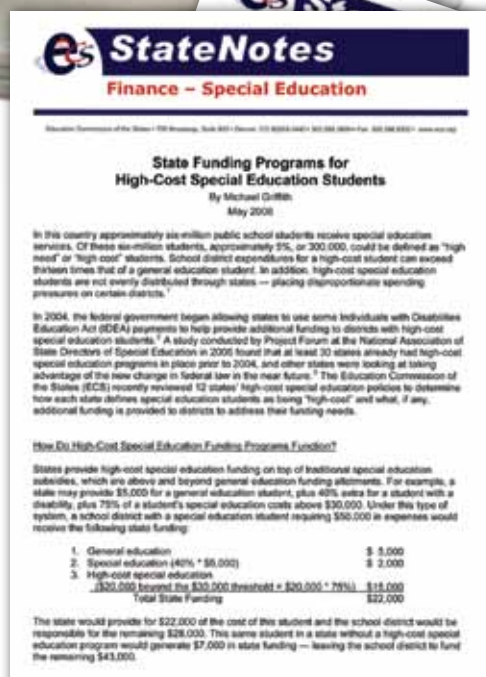
Clearinghouse staff partner with NCSL to serve the Legislative Education Staff Network through various convenings and to promote the exchange of information among members. We represent ECS as a managing partner with the Data Quality Campaign. We plan and manage sessions for the annual ECS National Forum on Education Policy. In addition, Clearinghouse staff led the effort to shepherd the migration of all ECS databases (external and internal; and for all divisions and projects) to a new, more powerful, platform.

## WE SYNTHESIZE 50-STATE POLICIES AND ANALYZE CHALLENGING ISSUES.

In 2008, Clearinghouse staff produced two editions of *The Progress of Education Reform* as well as multiple ECS StateNotes:

- ✦ *Counseling High School Students for Postsecondary and Workplace Success*
- ✦ *Secondary STEM Education*
- ✦ *Education-Related Ballot Questions: 2008*
- ✦ *On A Razor's Edge: The National Economy and School Budgets*
- ✦ *Adolescent Literacy*
- ✦ *State Funding Programs for High-Cost Special Education Students*
- ✦ *High School Level Accountability*
- ✦ *School Uniforms and Dress Codes: State Policies*
- ✦ *Number of Instructional Days/Hours in the School Year*
- ✦ *School Prayer, Moment of Silence, Other Policies Concerning Religion*
- ✦ *Cost Per-Day for Extended School Year*
- ✦ *State Education Governance Models*
- ✦ *Min. Number of Minutes/Hours in a High School Day*
- ✦ *State Collective Bargaining Policies for Teachers*
- ✦ *No Pass No Play*
- ✦ *Virtual High Schools*

Our team of seven serves multiple roles. Staff members who produced the numerous 50-state databases and issue briefs described under the High School Policy Center header of this report are housed in the ECS Clearinghouse.





# NATIONAL CENTER FOR LEARNING & CITIZENSHIP

The mission of ECS' National Center for Learning and Citizenship (NCLC) is to assist state and district leaders to promote, support and reward citizenship education as an essential component of America's education system. In support of this mission, NCLC focused work in 2008 on technical assistance, professional development, and advocacy for service-learning and citizenship education. NCLC incorporated youth engagement and youth voice in these activities. Highlights of these efforts include:

## TECHNICAL ASSISTANCE

NCLC provided targeted technical assistance to several states and organizations:

- ✦ Mississippi – Designed and facilitated the **2008 Destination Graduation: Teen Summit on Dropout Prevention**, engaging more than 1,100 people (teams of high school students, teachers and administrators) on the causes of and potential strategies to combat the dropout problem; coordinated the participation of Mississippi Youth Advisory Board members in the **2008 Destination Graduation: Adult Summit**.
- ✦ Wyoming – Conducted a service-learning workshop with the Wyoming Department of Education to equip participants with the knowledge and skills to implement high-quality service-learning in their schools.
- ✦ **Campaign for the Civic Mission of Schools (CMS)** – Developed the protocol used in CMS case studies to determine how civic learning can be built systematically throughout a school and district.

## PROFESSIONAL DEVELOPMENT

NCLC supported the professional development of district and state policymakers and education leaders in forums throughout the year:

- ✦ NCLC hosted the Administrators Academy at the 2008 National Service-Learning Conference. District and school leaders examined strategies to successfully integrate and sustain quality service-learning and align service-learning with district and school missions, education priorities and expected student outcomes.
- ✦ The 8th Annual Education Leadership Colloquium on the Civic Mission of American Education, held in conjunction with the ECS National Forum on Education Policy, engaged six state teams in professional development around the alignment of citizenship education and workforce/economic development.



## ADVOCACY FOR SERVICE-LEARNING AND CITIZENSHIP EDUCATION

NCLC recognizes the positive impact of service-learning and citizenship education on student achievement and success, and continues to advocate for service-learning and citizenship education:

- ✦ NCLC produced and disseminated *Service-Learning Policies and Practices: A Research-Based Advocacy Paper*, providing research summaries and policy examples.
- ✦ NCLC continued to support its network of 100 District Leaders for Civic Engagement and Service-Learning, focusing on regional work of member district superintendents and school board members to advocate for service-learning and citizenship education.

## YOUTH ENGAGEMENT

In keeping with the principles of service-learning and citizenship education, NCLC integrated youth voice in its events and activities whenever possible:

- ✦ NCLC hosted a Thinkers Meeting on Service-Learning and Hispanic Students; participants included three high school and college students.
- ✦ The Administrators Academy at the 2008 National Service-Learning Conference included student presenters and facilitators.
- ✦ NCLC's "Exploring the Benefits and Challenges of Involving Students in Policymaking" session at the ECS National Forum on Education Policy included a student panelist.
- ✦ Student leaders served as masters of ceremony, presenters and participants on state teams at the Education Leadership Colloquium on the Civic Mission of American Education.
- ✦ Mississippi Youth Advisory Board members co-facilitated activities for the *Destination Graduation: Teen Summit*, leading student and adult participants throughout the day.
- ✦ Local students participated in the Wyoming service-learning training.



In 2008, ECS intensified its work on the important linkage between postsecondary education and the workforce. The need to increase college attainment rates, particularly for those who have been traditionally underserved by postsecondary education, will be critical if states are to have the workforce they need to compete in a global economy. The current economic downturn puts additional pressure on postsecondary education to provide the education opportunities that can lead to livable wage jobs for more Americans. Following are the activities of the institute in 2008.

## POSTSECONDARY EDUCATION & WORKFORCE DEVELOPMENT INSTITUTE

### STATE PARTNERSHIPS FOR QUALITY TEACHER PREPARATION

ECS received a contract from the National Center for Teacher Transformation at St. Petersburg College to convene state leaders to explore better ways to bring together K-12 school districts and teacher preparation programs to use data and teacher competency standards to improve the quality of teacher preparation programs. The project, funded through a grant from the U.S. Department of Education Fund for the Improvement of Postsecondary Education (FIPSE), held a meeting in spring 2008 to examine several promising models for building stronger partnerships. The end result of the meeting was an idea paper that examined how strategies — such as valued-added data, state teacher competency standards and more effective integration of field experiences and induction of new teachers — can provide valuable insights into how teacher education programs respond to the changing needs of K-12 schools and school districts.



## DEVELOPMENTAL STUDIES REDESIGN INITIATIVE AT THE TENNESSEE BOARD OF REGENTS

ECS entered the second year of its partnership with the Tennessee Board of Regents (TBR) to redesign the delivery of remedial and developmental courses at TBR institutions. The project is funded through a grant from FIPSE. In 2008, six pilot projects at TBR institutions implemented models they developed through the course redesign process of the National Center for Academic Transformation. Early results have been promising. Several pilots report improved learning for students participating in the redesigned courses.

ECS worked with TBR to gather information on state and system policies from throughout the country. This work informed discussions on policy changes for TBR. In addition, ECS connected TBR participants to leaders across America on developmental education. In September, ECS convened P-16 leaders throughout the state of Tennessee to:

- ✦ Share early results for the project
- ✦ Explore how to link developmental education to other P-16 reform in the state
- ✦ Include developmental education in new high school graduation standards.

## REVVING THE EDUCATION ENGINE

Through a grant from the KnowledgeWorks Foundation, ECS convened policymakers and postsecondary and workforce leaders in an online dialogue or “jam” in October. A survey of state leaders explored the challenges and opportunities related to increasing the alignment of education, economic development and workforce development policy. The jam contributed to a yearlong initiative supporting state efforts to more effectively leverage education as a driver in state and regional workforce and economic development efforts.

## GETTING PAST GO: INCREASING COLLEGE SUCCESS FOR STUDENTS WHO REQUIRE DEVELOPMENTAL EDUCATION

In late 2008, ECS began work on a three-year, \$1.4 million initiative to work with state leaders to more effectively leverage investments in developmental education to increase college attainment rates. The initiative will:

- ✦ Conduct a 50-state survey of developmental education policies
- ✦ Complete a comprehensive literature review to examine the linkage between state and system policies and institutional practice
- ✦ Create a community of practice of policymakers and practitioners who will develop model policies for how states can maximize their investments in developmental education
- ✦ Conduct case studies in four to five states to examine the extent that state and system policy facilitates or inhibits innovation in developmental education
- ✦ Release toolkits of effective strategies and policies for improving the effectiveness of developmental education.

ECS partners are the Center on Policy Research on Preparation, Access and Remedial Education (PREPARE) at the University of Massachusetts Boston and Knowledge in the Public Interest. The project is funded by the Lumina Foundation for Education.



# TEACHING QUALITY & LEADERSHIP INSTITUTE

The mission of the Teaching Quality and Leadership Institute (TQLI) is to provide state policymakers and education leaders with high-caliber information to advance the quality of teaching and leadership. Subject areas include, but are not limited to: certification and licensure; compensation and diversified pay systems; teacher preparation; recruitment and retention; teacher and principal leadership; and professional development. We accomplish this mission by collaborating with others to explore, create and disseminate new research, model policies and innovative practices that will lead to greater levels of student learning.



ECS would like to congratulate the 2008 State Teachers of the Year. Many of these extraordinary individuals attended the 2008 National Forum on Education Policy.

## PRODUCTS, SERVICES, INFORMATION & EVENTS

### International Benchmarking Toolkit

In July 2008, at its National Forum on Education Policy, ECS released *From Competing to Leading: An International Benchmarking Blueprint*. This blueprint was created in response to growing concerns about the quality of education students in the United States are receiving and the lack of workforce competitiveness our students possess when compared to students in other countries.

The *International Benchmarking Toolkit* provides strategies, policies, information and other resources that educators and policymakers at any level can use to move toward benchmarking to international standards. The toolkit may be adopted in total, or adapted or implemented in phases. No one need wait for a full-blown initiative on international benchmarking to get started on what needs to be done to increase the skills of our students and increase their competitiveness in the global workforce. Access the toolkit at: [www.ecs.org/IB/toolkit.html](http://www.ecs.org/IB/toolkit.html).

## ARTICLES, REPORTS & DATABASES

- ★ *The Progress of Education Reform: Increasing Teacher Retention*,
- ★ State Policies databases on Teacher Recruitment and Retention, and Teacher Professional Development.
- ★ *State Partnerships for Quality Teacher Preparation* – policy paper for the National Center for Teacher Transformation co-authored with lead author Bruce Vandal, director of the ECS Postsecondary and Workforce Institute
- ★ *Strong Leaders, Strong Achievement: Model Policy for Producing the Leaders to Drive Student Success* (ECS policy brief) – co-authored with lead author Kathy Christie, ECS chief of staff, and Gary Whiteley, leadership consultant

## MAJOR WORK, PRESENTATIONS & EVENTS

- ★ ECS assembled 35 State Teachers of the Year at the 2008 National Forum on Education Policy to define what makes an effective teacher. These teachers, who are the best of the best, were convened to share their ideas directly with state policymakers attending the Forum.
- ★ ECS collaborated with The Third Mile Group on the ECS Regional Meetings held in Kansas City, Missouri (December 2008) and Boston (January 2009).
- ★ The Kansas City Heartland Regional Meeting, sponsored by the Kauffman Foundation, convened policymakers from Arkansas, Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, Ohio, Oklahoma and Wisconsin. The meeting's regional framework and small group structure created an engaging environment to discuss math and science teacher preparation, P-20 councils and alignment to the workforce.
- ★ The Boston New England Regional Meeting, sponsored by the Nellie Mae Education Foundation, convened policymakers from Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island and Vermont. The meeting's small group and state-specific framework allowed policymakers to delve deeply into alternative pathways to postsecondary education and work on 21st century skills delivery in the New England region.
- ★ ECS collaborated with the Third Mile Group on developing the Teaching Quality Strategy Team. This team of national experts will review past teaching quality initiatives and determine why these efforts have not been more successful and had greater impact on the teaching profession, and will provide new direction for improving teaching quality and leadership.
- ★ ECS collaborated with the Educational Testing Service (ETS) on Teacher Leadership development. This collaborative effort may lead to teacher leadership standards and more definition to clarify teacher leadership roles and responsibilities.

# THE 2008 ECS NATIONAL FORUM ON EDUCATION POLICY

## *“Transforming Education for the 21<sup>st</sup> Century”*

The 2008 ECS National Forum on Education Policy in Austin, Texas, drew a number of headliners including Secretary Margaret Spellings, U.S. Department of Education, Vicki Phillips, director of the Bill & Melinda Gates Foundation’s division of education strategy and grantmaking, former Governor Roy Romer and many of the 2008 State Teachers of the Year.

## 2008 ECS MEETINGS & EVENTS

### 2008 ECS AWARD WINNERS:



*James Bryant Conant Award*  
Ron Wolk, Co-founder of The Chronicle of Higher Education, Founder of Education Week, Chairman of the Board of the Big Picture Company

*Frank Newman Award for  
State Innovation*  
State of North Dakota



*ECS Corporate Award*  
Simon Youth Foundation  
Tim Ernest (accepted award)



*ECS Chair's Award:*  
Luther Olsen  
Senator, Wisconsin  
State Senate



*ECS Chair's Award:*  
Richard G. Rhoda  
Executive Director,  
Tennessee Higher  
Education Commission



### *International Benchmarking Blueprint — A First*

As a direct result of facilitated discussions at the Fall 2007 and Spring 2008 Steering Committee meetings, ECS produced *From Competing to Leading: The International Benchmarking Blueprint*, and introduced it at the 2008 ECS National Forum on Education Policy. The blueprint focuses on how to assist states, districts and schools to benchmark to high-performing countries.



The Education Commission of the States would like to thank the following yearlong corporate partners for their generous contributions to ECS and the National Forum.

## 2008 CORPORATE ALLIANCE FOR EDUCATION

PEARSON



### 2008 NATIONAL FORUM EVENT SPONSORS

Additionally, ECS would like to thank the following corporate sponsors for their generous contributions to the 2008 ECS National Forum on Education Policy.



HOUSTON ENDOWMENT INC.  
A PHILANTHROPY ENDOWED BY MR. AND MRS. JESSE H. JONES



THE MEADOWS FOUNDATION



# Financial Report: 2008 Summary

ECS Statement of Financial Position for year ending Dec. 31, 2008

## ASSETS

2008

### CURRENT ASSETS

Cash and cash equivalents	\$ 2,925,917
Grants and contracts receivable	1,896,699
State fees and other accounts receivable, less allowance for doubtful accounts of \$893,503 in 2008	1,684,060
Prepaid expenses	54,506

**TOTAL CURRENT ASSETS** \$ **6,561,182**

PROPERTY AND EQUIPMENT, at cost, less accumulated depreciation and amortization 294,320

### OTHER ASSETS

Investments	1,123,753
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**TOTAL ASSETS** \$ **7,979,255**

## LIABILITIES

### CURRENT LIABILITIES

Accounts payable	\$ 73,740
Accrued liabilities	
Vacation	78,882
Payroll and benefits	118,703
Other	23,971
Deferred revenue	4,625,446

**TOTAL CURRENT LIABILITIES** 4,920,742

**TOTAL LIABILITIES** \$ **4,920,742**

## NET ASSETS

### Net assets

Invested in capital assets	294,320
Unrestricted	2,722,039
Restricted	42,154

**TOTAL NET ASSETS** **3,058,513**

**TOTAL LIABILITIES AND NET ASSETS** \$ **7,979,255**

# Financial Report: 2008 Summary

## ECS Statement of Revenues, Expenses and Changes in Net Assets

### OPERATING REVENUES

Grants and contracts	
Foundation funding	\$ 877,990
Contract funding	249,797
State fees	4,224,796
Registration fees and corporate sponsorships	358,450
Web sponsorships	41,667
Publications and subscriptions	7,636
Other	121,654
	<hr/>
TOTAL OPERATING REVENUES	\$ 5,881,990

### OPERATING EXPENSES

Pre-K-16 policy studies	1,411,432
Information clearinghouse	692,352
State services	641,737
Development services	1,047
Executive/administration	2,155,308
	<hr/>
TOTAL OPERATING EXPENSES	\$ 4,901,876

OPERATING INCOME	980,114
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### NONOPERATING REVENUES (EXPENSES)

Net realized/unrealized gain on investments	(845,142)
Interest and dividends	94,918
Gain (loss) on disposal of assets	(253,992)

TOTAL NONOPERATING REVENUES (EXPENSES)	(1,004,216)
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CHANGE IN NET ASSETS	(24,102)
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NET ASSETS, BEGINNING OF PERIOD	3,082,615
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NET ASSETS, END OF PERIOD	<hr/> <hr/> \$ 3,058,513
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# FOUNDATIONS, CORPORATIONS & GOVERNMENT AGENCIES SUPPORTING ECS

## NEW GRANTS – 12-MONTH PERIOD

St. Petersburg – NCTT  
 State Farm Companies Foundation – Leadership  
 State Farm Companies Foundation – Case Study  
 Center for Civic Education – NCLC Meetings  
 KnowledgeWorks Economic Development  
 KnowledgeWorks – PI6-JAM  
 Lumina Foundation  
 Kauffman Foundation  
 Nellie Mae Education Foundation  
 GE Foundation

## ACTIVITY

*Civic Education*  
*Civic Education*  
*Civic Education*  
*Workforce Development*  
*Workforce Development*  
*Development Education*  
*Heartland Regional Meeting*  
*New England Regional Meeting*  
*2008 Progress of Education Reform*

## NEW CONTRACTS – 12-MONTH PERIOD

Academy for Educational Development – NCLC #2  
 State Farm – Hispanic Thinkers Meeting  
 Wyoming Department of Education  
 Pearson Financial  
 Western Interstate Commission for Higher Education (WICHE)

## ACTIVITY

*Civic Education*  
*Civic Education*  
*Civic Education*  
*Financial Analysis e-Clips sponsorship*  
*State-by-state overviews, remediation*

## CONTINUING GRANTS/CONTRACTS

Academy for Education Development – Service Learning  
 Anonymous – Windgate  
 Bay & Paul Foundation  
 Bill & Melinda Gates Foundation – High School  
 GE Foundation  
 Learning Point Associates – National Comprehensive Center for Teacher Quality  
 Mailman Foundation – Early Learning  
 MetLife Foundation – Leadership  
 Mississippi Department of Education  
 Tennessee Board of Regents – Fund for the Improvement of Postsecondary Education (FIPSE)  
 W.K. Kellogg Foundation - SPARK

Chair, 2008-10



Tim Pawlenty  
*Governor  
Minnesota*

Vice Chair



Barbara Clark  
*Assemblywoman and  
Member, Committee  
on Education  
New York State Assembly*

Treasurer



Richard Rhoda  
*Executive Director  
Tennessee Higher  
Education Commission*

Former Chair, 2006-08



Kathleen Sebelius  
*Governor  
Kansas*

# 2008 ECS EXECUTIVE COMMITTEE

as of December 31, 2008



Thomas Horgan  
*President and CEO  
New Hampshire  
College and  
University Council*



Dwight Jones  
*Commissioner of  
Education  
Colorado Department  
of Education*



Rae Ann Kelsch  
*Chair  
House Education Committee  
North Dakota House  
of Representatives*



Luther Olsen  
*Member, Senate  
Education Committee  
Wisconsin  
State Senate*



Norman Sakamoto  
*Majority Whip and  
Chairman, Senate  
Education Committee  
Hawaii State Senate*

## FINANCE COMMITTEE

### Chair

Richard Rhoda  
*Executive Director*  
*Tennessee Higher Education*  
*Commission*

### Vice Chair

Bill Wagnon  
*Chair*  
*Kansas State Board*  
*of Education*

### Con Bunde

*Member, Senate Labor and*  
*Commerce Committee*  
*Alaska State Senate*

### Barbara Cegavske

*Vice Chair, Senate Human Resources*  
*and Education Committee*  
*Nevada State Senate*

### Adrienne Jones

*Speaker Pro Tem*  
*Maryland House of Delegates*

### Stephen Wise

*Chair, Senate Education Pre-K-12*  
*Appropriations Committee*  
*Florida State Senate*

## NATIONAL FORUM PLANNING COMMITTEE

### Chair

Norman Sakamoto  
*Majority Whip and Chair*  
*Senate Education Committee*  
*Hawaii State Senate*

### Vice Chair

Thomas Horgan  
*President and CEO*  
*New Hampshire College and*  
*University Council*

### Barbara Clark

*ECS Vice Chair and Member*  
*Committee on Education*  
*New York State Assembly*

### Brenda Holmes

*Member*  
*Illinois State Board of Education*

### Carolina Novak

*President*  
*A+ Education Foundation*

### Robert Perry

*Executive Director*  
*South Dakota Board of Regents*

### W. Patrick Smith

*Deputy Director, Governor's Planning*  
*Office, State of Tennessee*

### Jess Stairs

*Co-Chair, House Education Committee*  
*Pennsylvania House of Representatives*

# 2008 ECS STANDING COMMITTEES

## NOMINATING COMMITTEE

### Chair

Kathleen Sebelius  
*Governor, State of Kansas*

### Vice Chair

Luther Olsen  
*Member, Senate Education Committee*  
*Wisconsin State Senate*

### John Andreason

*Senator, Idaho State Senate*

### Rae Ann Kelsch

*Chair, House Education Committee*  
*North Dakota House of Representatives*

### Suellen Reed

*Superintendent of Public Instruction*  
*Indiana Department of Education*

### Dave Sokola

*Chair, Senate Education Committee*  
*Delaware State Senate*



2008-10 ECS Vice Chair  
Barbara Clark visits with  
College Board President  
Gaston Caperton, a  
former Conant Award  
winner, in Austin.

**Chair**  
Tim Pawlenty  
*Governor*  
**MINNESOTA**

**Vice-Chair**  
Barbara Clark  
*Assemblywoman*  
**NEW YORK STATE ASSEMBLY**

**Treasurer**  
Richard Rhoda  
*Executive Director*  
*Tennessee Higher Education Commission*  
**TENNESSEE**

# 2008 ECS STEERING COMMITTEE

as of December 31, 2008

**ALABAMA:** *Caroline Novak, President,  
A+ Education Foundation*

**ALASKA:** *Con Bunde, Senator*

**AMERICAN SAMOA:** *Evelyn Godinet, School Principal*

**ARIZONA:** *Linda Gray, Senator*

**COLORADO:** *Dwight Jones, Commissioner of Education*

**CONNECTICUT:** *Judith Freedman, Senator*

**DELAWARE:** *Dave Sokola, Senator*

**DISTRICT OF COLUMBIA:** *Deborah Gist, State Superintendent  
of Education*

**FLORIDA:** *Stephen Wise, Senator*

**GEORGIA:** *Kathy Cox, State Superintendent of Schools*

**HAWAII:** *Norman Sakamoto, Senator*

**IDAHO:** *John Andreason, Senator*

**ILLINOIS:** *Brenda Holmes, member, State Board of Education*

**INDIANA:** *Suellen Reed, State Superintendent of  
Public Instruction*

**IOWA:** *Daryl Beall, Senator*

**KANSAS:** *Bill Wagnon, Chair, State Board of Education*

**KENTUCKY:** *Helen Mountjoy, Secretary, Department of  
Education and Workforce Development*

**MAINE:** *Sarah Redfield, Professor, Franklin Pierce Law Center*

**MARYLAND:** *Adrienne Jones, House Speaker Pro Tempore*

**MICHIGAN:** *Irma Clark-Coleman, Senator*

**MINNESOTA:** *Tim Pawlenty, Governor*

**MISSISSIPPI:** *Hank Bounds, State Superintendent of Education*

**MISSOURI:** *Jewell Scott, Executive Director, Civic Council of  
Greater Kansas City*

**MONTANA:** *Linda McColloch, State Superintendent of  
Public Instruction*

**NEBRASKA:** *John Bonaiuto, Executive Director, Nebraska  
Association of School Boards*

**NEVADA:** *Barbara Cegavske, Senator*

**NEW HAMPSHIRE:** *Thomas Horgan, President and CEO, New  
Hampshire College and University Council*

**NEW MEXICO:** *Bill Richardson, Governor*

**NEW YORK:** *Barbara Clark, Assemblywoman*

**NORTH CAROLINA:** *Howard Lee, Chair, North Carolina Board  
of Education*

**NORTH DAKOTA:** *Rae Ann Kelsch, Representative*

**OKLAHOMA:** *Sandy Garrett, State Superintendent of  
Public Instruction*

**OREGON:** *Susan Castillo, State Superintendent of  
Public Instruction*

**PENNSYLVANIA:** *Jess Stairs, Representative*

**PUERTO RICO:** *Lucy Arce-Ferrer, Senator*

**RHODE ISLAND:** *Peter McWalters, Commissioner of Education*

**SOUTH CAROLINA:** *Garrison Walters, Executive Director, South  
Carolina Commission on Higher Education*

**SOUTH DAKOTA:** *Robert Perry, Executive Director, South  
Dakota Board of Regents*

**TENNESSEE:** *Richard Rhoda, Executive Director,  
Tennessee Higher Education Commission*

**TEXAS:** *Robert Scott, Commissioner of Education*

**VIRGINIA:** *Tim Kaine, Governor*

**WEST VIRGINIA:** *Mary Poling, Representative*

**WISCONSIN:** *Luther Olsen, Senator*

**WYOMING:** *Jim McBride, State Superintendent of  
Public Instruction*



## **ALABAMA**

**Bob Riley, Governor**  
Stephanie Bell  
Larry Dixon  
H. Mac Gipson  
Sally Howell  
Caroline Novak

## **ALASKA**

**Sarah Palin, Governor**  
Con Bunde  
Esther Cox  
Laraine Derr  
Larry LeDoux  
Carl Gatto  
Carl Rose

## **AMERICAN SAMOA**

**Togiola Tulafano, Governor**  
Viane Etuale  
Evelyn Godinet  
Mapu Puaopea Paopao  
Tuana'itau Tuia

## **ARIZONA**

Paula Aboud  
Linda Gray  
Linda Lopez

## **ARKANSAS**

**Mike Beebe, Governor**  
Gilbert Baker  
Terry Hardy  
Kaneaster Hodges Jr.  
Ken James  
Calvin Johnson

## **CALIFORNIA**

**Arnold Schwarzenegger, Governor**  
Elaine Alquist  
Jack O'Connell  
Gene Mullin  
Kent Wong

## **COLORADO**

**Bill Ritter, Governor**  
Matt Gianneschi  
Beverly Ingle  
Dwight Jones  
Andrew Kerr  
Barbara O'Brien  
Sue Windels

## **CONNECTICUT**

**Jodi Rell, Governor**  
Cheryl Dickinson  
Andrew Fleischmann  
Thomas Gaffey  
Claudia Powers  
Patricia Sidas  
Betty Sternberg

## **DELAWARE**

**Ruth Ann Minner, Governor**  
Lisa Blunt-Bradley  
Sally Coonin  
Dave Sokola  
Nancy Wagner  
James Wolfe  
Valerie Woodruff

## **DISTRICT OF COLUMBIA**

**Adrian Fenty, Mayor**  
Robert Bobb  
Deborah Gist  
Vincent Gray

## **FLORIDA**

**Charlie Crist, Governor**  
Anitere Flores  
Frances Haithcock  
Evelyn Lynn  
Eric Smith  
Stephen Wise

## **GEORGIA**

**Sonny Perdue, Governor**  
Kathy Cox  
Erroll Davis Jr.  
Jan Jones  
Dan Weber

## **HAWAII**

**Linda Lingle, Governor**  
Ann Botticelli  
Pat Hamamoto  
Roy Takumi  
Rose Tseng  
Norman Sakamoto  
Dale Webster

## **IDAHO**

**C.L. Otter, Governor**  
John Andreason  
John Goedde  
David Hawk  
Bob Nonini

## **ILLINOIS**

**Rod Blagojevich, Governor**  
Anne Davis  
Ed Geppert  
Brenda Holmes  
Christopher Koch  
Kevin McCarthy

## **INDIANA**

**Mitch Daniels, Governor**  
Teresa Lubbers  
Gregory Porter  
Suellen Reed  
Earline Rogers

## **IOWA**

**Chet Culver, Governor**  
Daryl Beall  
Mary Chapman  
Nancy Boettger  
Roger Wendt

## **KANSAS**

**Kathleen Sebelius, Governor**  
Clay Aurand  
Christine Downey-Schmidt  
Robert McFrazier  
Alexa Posny  
Jean Schodorf  
Bill Wagnon



# 2008 ECS COMMISSIONERS

## KENTUCKY

**Steven Beshear, Governor**  
Gary Cox  
Bonnie Freeman  
Helen Mountjoy  
William Phillips  
Ken Winters

## LOUISIANA

**Bobby Jindal, Governor**  
Austin Badon  
Andre Coudrain  
Paul Pastorek  
Ben Nevers  
Phyllis Taylor  
Paul Vallas

## MAINE

**John Baldacci, Governor**  
Duke Albanese  
John Fitzsimmons  
Connie Goldman  
Elaine Makas  
Sarah Redfield

## MARYLAND

**Martin O'Malley, Governor**  
Patricia Ann Foerster  
Nancy Grasmick  
Adrienne Jones  
James Earl Lyons Sr.  
Delores Kelley  
Martha Smith

## MASSACHUSETTS

Bob Costrell  
David Driscoll  
Judith Gill  
Jim Peyser  
Stephen Tocco  
Jack Wilson

## MICHIGAN

**Jennifer Granholm, Governor**  
Sue Carnell  
Irma Clark-Coleman  
Wayne Kuipers  
Keith Pretty  
John Moolenaar

## MINNESOTA

**Tim Walz, Governor**  
John Berns  
Mindy Greiling  
Susan Heegaard  
Charles Wiger  
Alice Seagren  
Gen Olson

## MISSISSIPPI

**Haley Barbour, Governor**  
Hank Bounds  
Cecil Brown  
Videt Carmichael  
Doug Davis  
Thomas Meredith  
Charles Young Sr.

## MISSOURI

**Matt Blunt, Governor**  
Karen Dawson  
Kathlyn Fares  
Tom Kerber  
Jewell Scott  
Tina Zubeck

## MONTANA

**Brian Schweitzer, Governor**  
Linda McCulloch

## NEBRASKA

**David Heineman, Governor**  
John Bonaiuto  
Annette Dubas  
John Harms  
Ron Raikes  
Jess Wolf

## NEVADA

**Jim Gibbons, Governor**  
Barbara Cegavske  
Mo Denis  
Frank Meyers  
Keith Rheault  
Debbie Smith  
Alice Titus

## NEW HAMPSHIRE

**John Lynch, Governor**  
Iris Estabrook  
Thomas Horgan  
Daphne Kenyon  
Christen Lavers  
Emma Rous  
Lyonel Tracy

## NEW JERSEY

**Jon Corzine, Governor**  
William Librera  
Joan Voss

## NEW MEXICO

**Bill Richardson, Governor**  
Toney Anaya  
Reed Dasenbrock  
Gayle Dean  
Sharon Morgan  
Cynthia Nava  
Sheryl Stapleton

## NEW YORK

**David Paterson, Governor**  
Bea Gonzalez  
Barbara Clark  
Richard Mills  
Stephen Saland

## NORTH CAROLINA

**Mike Easley, Governor**  
Howard Lee  
Marvin Lucas  
Maggie Jeffus  
Ann McArthur  
Vernon Malone  
Marco Zarate

## NORTH DAKOTA

**John Hoeven, Governor**  
Art Conklin  
Doug Johnson  
Warren Larson  
Maryjane Martens  
Rae Ann Kelsch  
Gary Lee

## OHIO

**Ted Strickland, Governor**  
Michael Billirakis  
Joy Padgett  
Susan Tave Zelman

## OKLAHOMA

**Brad Henry, Governor**  
Nance Diamond  
Sandy Garrett  
Tony Hutchison  
Glen Johnson  
Tad Jones  
Susan Paddock

## OREGON

Peter Buckley  
Susan Castillo  
George Pernsteiner  
Jim Sager  
Vicki Walker  
Gene Whisnant

## PENNSYLVANIA

Edward Rendell, Governor  
Kenneth Jarin  
Raphael Musto  
Jim Rhoades  
James Roebuck Jr.  
Jess Stairs

## PUERTO RICO

**Anibal Acevedo Vila, Governor**  
Rafael Aragunde-Torres  
Lucy Arce-Ferrer

## RHODE ISLAND

**Donald Carcieri, Governor**  
Terri Adelman  
Peter McWalters  
Gary Sasse

## SOUTH CAROLINA

**Mark Sanford, Governor**  
Robert Hayes Jr.  
Larry Kobrovksy  
Ted Pitts Jr.  
Willis Walling  
Garrison Walters

## SOUTH DAKOTA

**Mike Rounds, Governor**  
Dale Bertsch  
Thomas Hawley  
Phyllis Heineman  
Rick Melmer  
Edwin Olson  
Robert Perry

## TENNESSEE

**Phil Bredesen, Governor**  
Gloria Bonner  
Richard Rhoda  
W. Patrick Smith  
Tim Webb  
Leslie Winningham  
Jamie Woodson

## TEXAS

**Rick Perry, Governor**  
Bob Eissler  
Geanie Morrison  
Raymund Paredes  
Robert Scott  
Florence Shapiro  
Royce West

## UTAH

**Jon Huntsman Jr., Governor**  
Gordon Snow  
Howard Stephenson

## VERMONT

**James Douglas, Governor**  
Angelo Dorta  
Doug Racine  
Diane Wolk

## VIRGIN ISLANDS

**John DeJongh Jr., Governor**  
Norman Baptiste  
Whitman Browne  
Liston Davis  
Terrence Joseph  
Keith Richards

## VIRGINIA

**Tim Kaine, Governor**  
R. Edward Houck  
Algie Howell  
Elizabeth Lodal  
Gregory Schuckman  
Timothy Sullivan  
Patricia Wright

## WEST VIRGINIA

**Joe Manchin, III, Governor**  
Brian Noland  
Steve Paine  
Robert Plymale  
Mary Poling  
Nancy Sturm

## WISCONSIN

**Jim Doyle, Governor**  
Elizabeth Burmaster  
Doug Hastad  
John Lehman  
Don Pridemore  
Luther Olsen  
Bette Lang

## WYOMING

**Dave Freudenthal, Governor**  
Rollin Abernethy  
Henry Coe  
Carla Gregorio  
Jim McBride  
Mary Throne  
Kathryn Valido



# EQUIPPING EDUCATION LEADERS, ADVANCING IDEAS



Elizabeth Lodal, ECS Commissioner and former principal of Thomas Jefferson High School for Science and Technology, Virginia, asks a question during the school tour at Manor New Tech High School.



Student leaders and school officials worked to develop action plans during the Education Leadership Colloquium on the Civic Mission of American Education.

## Education Commission of the States

2008-10 ECS Chair

Minnesota Governor Tim Pawlenty

ECS President

Roger Sampson

700 Broadway Suite 810

Denver, CO 80203-3442

303.299.3600

303.296.8332 fax

[www.ecs.org](http://www.ecs.org)

[ecs@ecs.org](mailto:ecs@ecs.org)

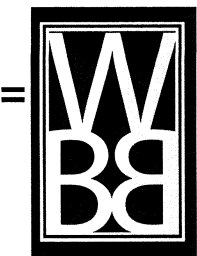
**Education Commission of the States**  
**(a 501(c)(3) organization)**  
**FINANCIAL STATEMENTS**

**December 31, 2008**

**Education Commission of the States**  
**(a 501(c)(6) organization)**  
**FINANCIAL STATEMENTS**

**December 31, 2008**

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Mark E. Wagner, CPA  
Kelly R. Burke, CPA  
Eric S. Barnes, CPA

## Independent Auditors' Report

To the Board of Directors  
Education Commission of the States  
Denver, Colorado

We have audited the accompanying statement of net assets of Education Commission of the States (the Commission, a nonprofit organization) as of December 31, 2008, and the related statements of revenues, expenses, and changes in net assets and cash flows for the year then ended. These financial statements are the responsibility of the Commission's management. Our responsibility is to express an opinion on these financial statements based on our audit.

We conducted our audit in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement. An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements. An audit also includes assessing the accounting principles used and significant estimates made by management, as well as evaluating the overall financial statement presentation. We believe that our audit provides a reasonable basis for our opinion.

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of Education Commission of the States as of December 31, 2008, and the changes in its net assets and its cash flows for the year then ended in conformity with accounting principles generally accepted in the United States of America.

The management's discussion and analysis on pages 2 through 6 is not a required part of the basic financial statements but is supplementary information required by accounting principles generally accepted in the United States of America. We have applied certain limited procedures, which consisted principally of inquiries of management regarding the methods of measurement and presentation of the required supplementary information. However, we did not audit the information and express no opinion on it.

Our audit was conducted for the purpose of forming an opinion on the basic financial statements taken as a whole. The statement of functional expenses on page 17 is presented for purposes of additional analysis and is not a required part of the basic financial statements. Such information has been subjected to the auditing procedures applied in the audit of the basic financial statements and, in our opinion, is fairly stated in all material respects in relation to the basic financial statements taken as a whole.

*Wagner, Burke & Barnes, LLP*

Golden, Colorado  
April 8, 2009

**EDUCATION COMMISSION OF THE STATES**  
**MANAGEMENT'S DISCUSSION AND ANALYSIS – UNAUDITED**  
**December 31, 2008**

The management of the Education Commission of the States presents the following overview and analysis of financial activities for the year ended December 31, 2008 and the year ended December 31, 2007 (FY 2008 and FY 2007, respectively). This should be read in conjunction with the financial statements succeeding this section.

**Financial Highlights**

- The Commission had an approximate \$24,100 deficit of revenue under expenses in FY 2008. This deficit produced a 1% decrease in total net assets.
- In response to a decline in operating revenue and to maximize the use of resources, the Commission reduced FY 2008 operating expenses by approximately \$595,000 – an 11% decrease from FY 2007 operating expenses.
- Net investment losses (realized and unrealized) for FY 2008 were approximately \$750,000 on an average investment portfolio, including certificates of deposit of approximately \$2.62 million.

**Basic Financial Statements**

The Commission's basic financial statements are prepared using the accrual basis of accounting. Revenue is recorded when earned and expenses are recorded when incurred. The basic financial statements include a statement of net assets, a statement of revenues, expenses, and changes in net assets, and a statement of cash flows. These are followed by notes to the financial statements.

The *statement of net assets* presents information on the Commission's assets and liabilities, with the difference between the two reported as net assets. Over time, increases or decreases in net assets may indicate whether the Commission's financial position is improving or deteriorating.

The *statement of revenues, expenses and changes in net assets* reports the fiscal year's operating and non-operating revenues and expenses. The difference between these revenues and expenses determines the year's changes in net assets. The current year's change in net assets, when combined with the previous year's ending net assets, equals the asset total at the end of the current year.

The *statement of cash flows* reports the fiscal year's changes in cash and cash equivalents resulting from operating, capital and related financing, and investing activities. This statement differs from the statement of revenues, expenses and changes in net assets by reporting only transactions resulting in cash receipts or cash disbursements.

The *notes to the financial statements* provide additional information that is essential to a full understanding of the financial statements. In addition to the basic financial statements and accompanying notes, this report also presents supplementary information that may be beneficial to the readers.

**EDUCATION COMMISSION OF THE STATES**  
**MANAGEMENT'S DISCUSSION AND ANALYSIS – UNAUDITED**  
**December 31, 2008**

**Financial Analysis**

**Summary Statement of Net Assets**

(Amount in thousands)

	FY	FY	<u>2008-2007</u>	
	2008	2007	Increase (Decrease)	% Change
<b>Assets:</b>				
Current Assets	\$ 6,561	\$ 2,258	\$ 4,303	191%
Investments	1,124	1,928	(804)	-42%
Capital assets (net)	294	651	(357)	-55%
<b>Total assets</b>	<u>\$ 7,979</u>	<u>\$ 4,837</u>	<u>\$ 3,142</u>	<u>65%</u>
<b>Liabilities:</b>				
Current liabilities	\$ 4,921	\$ 1,754	\$ 3,167	181%
<b>Total liabilities</b>	<u>\$ 4,921</u>	<u>\$ 1,754</u>	<u>\$ 3,167</u>	<u>181%</u>
<b>Net assets:</b>				
Invested in capital assets, net of related debt	\$ 294	\$ 651	\$ (357)	-55%
Restricted	42	110	(68)	-62%
Unrestricted	2,722	2,322	400	17%
<b>Total net assets</b>	<u>\$ 3,058</u>	<u>\$ 3,083</u>	<u>\$ (25)</u>	<u>-1%</u>

**Net Assets**

- The Commission's net assets were \$3.06 million as of December 31, 2008, a decrease of \$24,100 or 1% from the prior year's ending balance. As of December 31, 2007, the Commission's net assets totaled \$3.08 million.
- Current assets increased \$4.30 million or 191% in FY 2008 primarily due to an increase in cash and cash equivalents resulting from a transfer of funds from the investment portfolio and a large increase in grants receivable. The transfer was made to reduce the risk in the allocation of investments due to the uncertainty in the financial markets.
- The Commission's investment portfolio was valued at \$1.12 million as of December 31, 2008, a 42% decrease from FY 2007.
- Current liabilities increased \$3.17 million or 181% in FY 2008. This was due primarily to increases in deferred revenue balances due to large projects pending completion.

**EDUCATION COMMISSION OF THE STATES**  
**MANAGEMENT'S DISCUSSION AND ANALYSIS – UNAUDITED**  
**December 31, 2008**

- Net assets invested in capital assets decreased \$357,000 or 55% in FY 2008. This decrease represents the retirement of nonproductive assets sold or disposed of during the relocation of office space during the year.
- The Commission's investment in capital assets (furniture and fixtures, leasehold improvements, equipment, computer hardware and software) represents approximately 10% of FY 2008 total net assets. The Commission uses these assets in the normal course of doing business and they are therefore not available for future spending. The remaining balance of the Commission's net assets is comprised of restricted and unrestricted net assets. The unrestricted net assets may be used to meet the Commission's ongoing obligations. In FY 2008, approximately \$2.72 million or 89% of the Commission's total net assets were unrestricted.

**Changes in Net Assets**

As noted earlier, an increase in an entity's net assets over time may indicate a positive financial position, while a decrease may indicate a negative trend. The Commission had an approximate \$24,100 deficit of revenue under expenses in FY 2008. This deficit produced a 1% decrease in total net assets. Although operating revenue exceeded operating expenses by approximately \$980,000 during 2008, non-operating revenues and expenses of approximately \$(1,004,000) created a \$24,000 deficit and caused the Commission to end the fiscal year with an overall reduction in net assets.

**Summary Statement of Revenues**

(Amount in thousands)

	FY	FY	<u>2008-2007</u>	
	<u>2008</u>	<u>2007</u>	<u>Increase</u>	<u>%</u>
			<u>(Decrease)</u>	<u>Change</u>
Revenues:				
Operating				
Grants and contracts	\$ 1,128	\$ 1,878	\$ (750)	-40%
State Fees	4,225	4,144	81	2%
Registration and sponsorships	400	353	47	13%
Other	129	73	56	77%
Total operating revenues	<u>\$ 5,882</u>	<u>\$ 6,448</u>	<u>\$ (566)</u>	-9%
Nonoperating				
Net investment gain (loss)	(845)	89	(934)	-1049%
Gain (loss) on disposal of assets	(254)	-	(254)	-
Interest	95	81	14	17%
Total nonoperating revenues	<u>\$ (1,004)</u>	<u>\$ 170</u>	<u>\$ (1,174)</u>	-691%
Total Revenues	<u><u>\$ 4,878</u></u>	<u><u>\$ 6,618</u></u>	<u><u>\$ (1,740)</u></u>	-26%

**EDUCATION COMMISSION OF THE STATES**  
**MANAGEMENT'S DISCUSSION AND ANALYSIS – UNAUDITED**  
**December 31, 2008**

In FY 2008, total revenues decreased \$1,740,000 or 26% from FY 2007 levels.

- Grant and contract revenue in FY 2008 decreased \$750,000 or 40% from FY 2007 levels.
- State fee revenue increased 2% in FY 2008.
- In FY 2008, net investment losses were \$(845,000), but were partially offset by a 17% increase in interest and dividend revenue in FY 2008. This decrease was directly related to the reduction in value in U.S. and international financial markets.

**Summary Statement of Expenses**

(Amount in thousands)

	<u>FY</u>	<u>FY</u>	<u>2008-2007</u>	
	<u>2008</u>	<u>2007</u>	<u>Increase</u>	<u>%</u>
			<u>(Decrease)</u>	<u>Change</u>
Expenses				
Operating				
Pre-K-16 Policy Studies	\$ 1,411	\$ 1,476	\$ (65)	-4%
Information Clearinghouse	692	757	(65)	-9%
State Services	642	824	(182)	-22%
Development Services	1	49	(48)	-98%
Executive/Administration	2,155	2,390	(235)	-10%
Total Operating Expenses	<u>\$ 4,901</u>	<u>\$ 5,496</u>	<u>\$ (595)</u>	-11%
Nonoperating				
Interest Expense	-	26	(26)	-100%
Total Nonoperating Expense	<u>\$ -</u>	<u>\$ 26</u>	<u>\$ (26)</u>	
Total Expenses	<u>\$ 4,901</u>	<u>\$ 5,522</u>	<u>\$ (621)</u>	-11%

In order for the Commission to maintain its financial position, FY 2008 expenses were reduced to correspond to expected revenue decreases. A strategic effort was also made to ensure resources were used effectively. In FY 2008, total expenses decreased \$621,000 or 11% from FY 2007.



**EDUCATION COMISSION OF THE STATES**  
**MANAGEMENT'S DISCUSSION AND ANALYSIS – UNAUDITED**  
**December 31, 2008**

- Policy studies declined \$65,000 or 4% in FY 2008.
- In FY 2008, a decrease of \$65,000 or 9% in information clearing house expenses was due to staff restructuring.
- State and communication services' expenses declined \$182,000 or 22% in FY 2008. This decrease can be attributed to a reduction in travel, consultant and meeting expenditures.
- Development expenses in FY 2008 decreased \$48,000 or 98% primarily due to staff restructuring and reduced travel activity.
- Executive and administrative expenses decreased by \$235,000 or 10% in FY 2008. This decrease is attributable to staff restructuring and a significant drop in consultant fees and use thereof.

EDUCATION COMMISSION OF THE STATES

STATEMENT OF NET ASSETS

December 31, 2008

ASSETS

CURRENT ASSETS

Cash and cash equivalents	\$ 2,925,917
Grants and contracts receivable	1,896,699
State fees and other accounts receivable, less allowance for doubtful accounts of \$893,503	1,684,060
Prepaid expenses	54,506
TOTAL CURRENT ASSETS	<u>6,561,182</u>

PROPERTY AND EQUIPMENT

Property and equipment	1,521,620
Less accumulated depreciation and amortization	<u>(1,227,300)</u>
NET PROPERTY AND EQUIPMENT	<u>294,320</u>

OTHER ASSETS

Investments	<u>1,123,753</u>
TOTAL ASSETS	<u>7,979,255</u>

LIABILITIES

CURRENT LIABILITIES

Accounts payable	73,740
Accrued vacation	78,882
Accrues payroll and benefits	118,703
Other accrued expenses	23,971
Deferred revenue	<u>4,625,446</u>
TOTAL CURRENT LIABILITIES	<u>4,920,742</u>
TOTAL LIABILITIES	<u>4,920,742</u>

NET ASSETS

Invested in capital assets, net	294,320
Restricted	42,154
Unrestricted	<u>2,722,039</u>
Total net assets	<u>\$ 3,058,513</u>

*The accompanying Notes to Financial Statements are an integral part of these statements.*

**EDUCATION COMMISSION OF THE STATES**  
**STATEMENT OF REVENUES, EXPENSES, AND CHANGES IN NET ASSETS**  
**Year Ended December 31, 2008**

**OPERATING REVENUES**

Grants and contracts	
Foundation funding	\$ 877,990
Contract funding	249,797
State fees	4,224,796
Registration fees and corporate sponsorships	358,450
Web sponsorships	41,667
Publications and subscriptions	7,636
Other	121,654
<b>TOTAL OPERATING REVENUES</b>	<u>5,881,990</u>

**OPERATING EXPENSES**

Pre-K-16 poliy studies	1,411,432
Information clearinghouse	692,352
State services	641,737
Development services	1,047
Executive/administration	2,155,308
<b>TOTAL OPERATING EXPENSES</b>	<u>4,901,876</u>

**OPERATING INCOME**

980,114

**NONOPERATING REVENUES (EXPENSES)**

Net realized/unrealized gain (loss) on investments	(845,142)
Interest and dividend income	94,918
Gain/(loss) on disposal of assets	(253,992)
<b>TOTAL NONOPERATING REVENUES (EXPENSES)</b>	<u>(1,004,216)</u>

**CHANGE IN NET ASSETS**

(24,102)

**NET ASSETS, Beginning of year**

3,082,615

**NET ASSETS, End of year**

\$ 3,058,513

*The accompanying Notes to Financial Statements are an integral part of these statements.*

**EDUCATION COMMISSION OF THE STATES**  
**STATEMENTS OF CASH FLOWS**  
**For the Years Ended December 31, 2008**

**CASH FLOWS FROM OPERATING ACTIVITIES**

State fees	\$ 3,486,890
Grants and contracts	1,938,480
Registrations and sponsorships	358,450
Payments for goods and services	(2,785,064)
Payments to and on behalf of employees	(2,024,493)
Other receipts	170,957
<b>Net cash provided by operating activities</b>	<u>1,145,220</u>

**CASH FLOWS FROM CAPITAL FINANCING ACTIVITIES:**

Cash received from sale of assets	92,270
Additions to property and equipment	(59,171)
<b>Net cash provided by capital financing activities</b>	<u>33,099</u>

**CASH FLOWS FROM INVESTING ACTIVITIES:**

Net investment income	94,918
Net proceeds from sale/maturity of marketable securities	583,244
<b>Net cash provided by investing activities</b>	<u>678,162</u>

**NET INCREASE IN CASH AND CASH EQUIVALENTS** 1,856,481

**CASH AND CASH EQUIVALENTS - Beginning of year** 1,069,436

**CASH AND CASH EQUIVALENTS - End of year** \$ 2,925,917

**RECONCILIATION OF OPERATING INCOME (LOSS) TO NET CASH PROVIDED BY OPERATING ACTIVITIES**

Operating income	\$ 980,114
Adjustments to reconcile operating income to net cash provided by operating activities:	
Loss on disposition of assets	(253,992)
Reduction in straight-line rent accrual	(351,225)
Depreciation and amortization	69,878
(Increase) decrease in:	
State fees and other accounts receivable, net of allowance	(827,390)
Grants and contracts receivable	(1,635,966)
Prepaid expenses and other assets	16,943
Increase (decrease) in:	
Accounts payable	5,498
Deferred revenue	3,154,827
Accrued payroll	(13,467)
<b>Net cash provided by operating activities</b>	<u><u>\$ 1,145,220</u></u>

*The accompanying Notes to Financial Statements are an integral part of these statements.*

**Education Commission of the States**  
*(a 501(c)(3) organization)*  
**NOTES TO FINANCIAL STATEMENTS**  
**(continued)**  
**December 31, 2008**

**Note 1 - Nature of activities and summary of significant accounting policies**

**Nature of activities**

The Education Commission of the States (the Commission), a nonprofit organization, was founded in 1966. The primary purpose of the Commission is to assist governors, state legislators, state education officials and others to identify, develop and implement public policy for education that addresses current and future needs of a learning society. Forty-nine states, American Samoa, Puerto Rico, the District of Columbia, and the Virgin Islands have enacted enabling legislation to join the commission. As the Commission is governed by a Board consisting of a representative from each member state, it is required to use a governmental reporting format.

**Description of services provided**

Pre-K-16 policy studies – Identifies, studies and provides information about education trends and issues that are of greatest concern to its constituents. The Commission is establishing a national presence in six key policy areas: Accountability, Finance, Governance, Leadership, Teaching Quality and P-16 transitions. These issues are explored across all levels of the education system – early learning, K-12 and postsecondary – through a variety of "lenses" including technology, urban schools, rural education, access and equity. The division also houses the EDC Center for Community College Policy and the National Center for Learning and Citizenship, a K-12 service-learning project.

Information clearinghouse – As the research arm of the Commission and a major centralized national source of information about education issues and trends, the Clearinghouse responds to over 3,000 inquiries annually from constituent and media sources and provides in-depth analysis of education policy issues through the Commission website ([www.ecs.org](http://www.ecs.org)).

State services – Helps the Commission to be more effective in working with its member states by gathering information about the education environment, developing strong working relationships with policymakers in all states, and evaluation the impact of the Commission's work in states.

Development services – has the responsibility for cultivating professional relationships with senior officers of major national foundations, federal government agencies, and corporate giving programs. Participates in developing and soliciting proposals for funding in order to secure financial resourced for the Commission.

Executive/administration – Those activities necessary for planning, coordination and overall direction of the Commission, financial administration, general board activities and other related activities indispensable to the Commission's existence.

**Education Commission of the States**  
*(a 501(c)(3) organization)*  
**NOTES TO FINANCIAL STATEMENTS**  
**(continued)**  
**December 31, 2008**

**Basis of accounting**

The commission's financial statements are prepared using the economic resources measurement focus and the accrual basis of accounting, which recognizes revenues when earned and expenses when incurred. The Commission applies all Governmental Accounting Standards Board (GASB) pronouncements as well as Financial Accounting Standards Board (FASB) statements and interpretations issued on or before November 30, 1989, unless those pronouncements conflict with or contradict GASB pronouncements.

Operating revenues and expenses result from providing program services and executing functional activities in connection with the Commission's principal ongoing operations. Revenues and expenses not meeting these criteria are reported as non-operating revenues and expenses.

It is the Commission's policy to first apply restricted resources when an expense is incurred for purposes for which both restricted and unrestricted net assets are available.

**Cash and cash equivalents**

For purposes of the statement of cash flows, the Commission considers all cash on hand, cash on deposit, and highly liquid investments purchased with an original maturity date of three months or less to be cash equivalents.

**Investments**

Investments in debt and equity securities with readily determinable fair values are measured at fair value in the statement of net assets. Gains or losses (both realized and unrealized) on these investments are reported in the statement of revenues, expenses, and changes in net assets.

**Property and equipment**

Furniture, equipment and leasehold improvements are recorded at cost, if purchases, and at estimated fair value on the date of receipt if donated. Leasehold improvements are amortized over the lesser of the lease term or the estimated useful life of the asset. Depreciation and amortization are computed on the straight-line method over the following estimated useful lives:

Software	3 years
Hardware	3-5 years
Equipment	3-7 years
Furniture and fixtures	7-15 years
Leasehold improvements	15 years



**Education Commission of the States**  
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**NOTES TO FINANCIAL STATEMENTS**  
**(continued)**  
**December 31, 2008**

Software and website costs incurred for internal use are capitalized, or expenses, in accordance with Statement of Position 98-1, *Accounting for the Costs of Computer Software Developed or Obtained for Internal Use*. Costs capitalized are amortized using the straight-line method over an estimated useful life of three years. As of December 31, 2008, total software and website development costs capitalized were \$309,373.

**Deferred revenue**

Deferred revenue represents amounts received in advance that will be recognized as revenue in the year earned.

**Compensated absences**

Employees of the Commission are entitled to paid absences depending on their length of service and other factors. At December 31, 2008 and 2007, the Commission had an obligation to employees for accrued compensated absences in the amount of \$78,882 and \$85,698, respectively.

**Revenue recognition**

Grants and contracts – Revenue is recognized on grants and contracts deemed to be exchange transactions, based upon allowable, reimbursable expenses incurred. Cash is deposited into and disbursed from a single checking account with accountability by project maintained through the use of project accounting. The Commission recognized revenue on nonexchange grants in accordance with GASB 33, *Accounting and Financial Reporting for Nonexchange Transactions*. Revenues are recognized when they are measurable and available. Measurability is determined based on the terms set forth in the grant agreement. The Commission considers grant funds to be available when they are received. Commitments to the Commission, from funding through grants and contracts, in excess of the year-end grants and contracts receivable balance total approximately \$290,000 at December 31, 2008.

State fees – State fees consist of annual appropriations from participating states. Revenue is recognized ratably over the appropriation period, which is July 1 through June 30.

Web sponsorship – The Commission receives sponsorships from various corporations. Generally, they are one-year sponsorships. Revenue relating to these sponsorships is recognized ratably over the sponsorship period.

**Education Commission of the States**  
*(a 501(c)(3) organization)*  
**NOTES TO FINANCIAL STATEMENTS**  
**(continued)**  
**December 31, 2008**

**Indirect cost reimbursement**

The Commission is allowed to recover certain indirect costs incurred in servicing projects funded by grants and contracts. Reimbursement is recorded as a reduction of expenses based on provisional indirect cost recovery rates. Final recovery rates are based upon audits of the costs by the grantor or contracting agency. Management is of the opinion that any adjustments that may result from the audit of final indirect cost recovery rates will not have a material effect on the accompanying financial statements.

**Income taxes**

The Commission is a not-for-profit corporation and tax-exempt under Internal Revenue Code Section 501(c)(3), except for unrelated business income as defined in the Internal Revenue Code. During the year ended December 31, 2008, the Commission had no net income considered to be unrelated to its tax exempt purpose; therefore there is no provision for income tax in the accompanying financial statements.

**Use of estimates**

The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America requires Commission management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements and the reported amounts of revenues and expenses during the reporting period. Actual results could differ from those estimates.

**Note 2 - Deposits and investments**

**Cash deposits**

Up to \$250,000 of deposit balances on hand at banking institutions is covered by federal depository insurance (FDIC). Under the provisions of GASB 40 – *Deposit and Investment Risk Disclosures*, deposits are deemed exposed to custodial credit risk if they are collateralized with securities held by the pledging institution. Custodial risk is the risk that in the event of bank failure, the Commission's deposits may not be returned to it. As of December 31, 2008, the Commission had no deposits exposed to custodial credit risk under the provisions of GASB 40.

**Education Commission of the States**  
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**NOTES TO FINANCIAL STATEMENTS**  
**(continued)**  
**December 31, 2008**

The District's cash deposits at December 31, 2008 are as follows:

	<u>Carrying Balance</u>	<u>Bank Balance</u>
Cash deposits	\$ 734,762	\$ 796,675
Certificates of deposit	<u>2,191,155</u>	<u>2,191,155</u>
Total	<u>\$ 2,925,917</u>	<u>\$ 2,987,830</u>

**Investments**

Investments include various types of mutual funds. As of December 31, 2008, the Commission had the following investments:

	<u>Fair Value</u>
Mutual Funds:	
Vanguard Emerging Markets	\$ 146,827
Vanguard Energy	23,724
Vanguard 500 index	433,777
Vanguard Windsor II	187,662
Vanguard International Growth	208,028
Vanguard International Value	<u>123,735</u>
Total investments	<u>\$ 1,123,753</u>

All of the Commission's investments are mutual funds and are not subject to custodial credit risk disclosure requirements because they are not evidenced by specific securities.

**Note 3 – Property and equipment**

Property and equipment activity for 2008 is as follows:

	<u>Beginning Balance</u>	<u>Increases</u>	<u>Decreases</u>	<u>Ending Balance</u>
Furniture and fixtures	\$ 739,527	\$ 24,085	\$ 338,545	\$ 425,067
Leasehold improvements	289,851	41,597	256,923	74,525
Office equipment	260,776	6,160	85,705	181,231
Computer hardware and software	<u>840,797</u>	<u>-</u>	<u>-</u>	<u>840,797</u>
Total	2,130,951	71,842	681,173	1,521,620
Accumulated depreciation and amortization	<u>(1,479,661)</u>	<u>(69,878)</u>	<u>322,239</u>	<u>(1,227,300)</u>
Net property and equipment	<u>\$ 651,290</u>	<u>\$ 1,964</u>	<u>\$ 358,934</u>	<u>\$ 294,320</u>

**Education Commission of the States**  
*(a 501(c)(3) organization)*  
**NOTES TO FINANCIAL STATEMENTS**  
**(continued)**  
**December 31, 2008**

The aggregate depreciation and amortization charged to operations was \$69,878 for the year ended December 31, 2008.

**Note 4 – Deferred revenue**

Deferred revenue consists of the following at December 31, 2008:

State fees	\$2,112,402
Grants and contracts	<u>2,513,044</u>
Total	<u>\$4,625,446</u>

**Note 5 – Restricted net assets**

Restricted net assets consists of amounts received and recognized as revenue from nonexchange foundation grants for which the corresponding project has not been completed. Restricted net assets consist of the following at December 31, 2008:

Kauffman Foundation grant	\$11,854
Nellie Mae Foundation grant	<u>30,300</u>
Total	<u>\$42,154</u>

**Note 6 – Pension plan and deferred compensation plan**

The Education Commission of the States Defined Contribution Retirement Plan (the Plan) covers substantially all employees. The Commission's contributions to the plan during the year ended December 31, 2008 was 5% of gross salaries. Additionally, during the year the Commission matched up to 3% of the employee's voluntary contribution. These contributions are made on a monthly basis. The Commission's total retirement expense for the year ended December 31, 2008 was \$105,409. Employee contributions totaled \$118,722 for the year ended December 31, 2008.

In 2001, the Commission established a deferred compensation plan. Under the provisions of the plan, select employees elect to have a portion of their salary withheld and contributed to the plan. The assets are held by the Commission and are subject to the claims of its general creditors until the employees become eligible for withdrawals as provided in the plan agreement. The asset and related liability at December 31, 2008 was \$7,667.

**Note 7 – Line of credit**

The Commission maintains a one-year variable rate revolving line of credit arrangement with a \$1,000,000 limit. This arrangement limits advances to 65% of the current investment portfolio balance. The line had a 7.57% interest rate and a zero balance at December 31, 2008.

**Education Commission of the States**  
**(a 501(c)(3) organization)**  
**NOTES TO FINANCIAL STATEMENTS**  
**(continued)**  
**December 31, 2008**

**Note 8 – Commitments and contingencies**

Operating Leases – The Commission entered into a lease for office space which expires December 31, 2016. Lease rates were amended in effective May 1, 2008, leading to an average monthly rent reduction of approximately \$15,800. The lease is subject to a 3% annual escalation of base rent. The commission has the option to extend for two additional five-year terms at rates defined in the lease agreement. The commission also has various equipment leases which expire in 2009 and 2010. Straight-line rent expense for the year ended December 31, 2008 was \$344,369

Future minimum rental payments for non-cancelable operating leases at December 31, 2008 are as follows:

Year Ending December 31,

2009	\$272,697
2010	264,670
2011	270,763
2012	278,886
2013	287,253
Thereafter	<u>913,722</u>
Total	<u>\$2,287,991</u>

Indemnification – Under the Bylaws, the Commission's directors, officers, members, employees, and agents are indemnified against certain liability arising out of the performance of their duties to the Commission. The Commission also has an insurance policy for its directors, officers, and employees to insure them against liabilities arising from the performance of their duties required by their positions with the Commission. The Commission's maximum exposure under these arrangements is unknown as this would involve future claims. The Commission expects the risk of loss to be remote.

**Note 9 – Restatement**

As a result of renegotiated lease terms, the Commission reduced its liability for lease expense on the straight-line basis by \$351, 225. Net assets as of December 31, 2007 have been restated to reflect the affects of the reduction in lease expense payable. Net assets as originally reported at December 31, 2007 were \$2,731,390 and have been restated to \$\$3,082,615.

\* \* \* \* \*

## **SUPPLEMENTAL INFORMATION**



# EDUCATION COMMISSION OF THE STATES

## STATEMENT OF FUNCTIONAL EXPENSES

Year Ended December 31, 2008

	Program Services				Executive & Administration	Total
	Pre-K-16 Policy Studies	Information Clearinghouse	State Services	Development Services		
Personnel expense	\$ 759,247	\$ 461,659	\$ 197,808	\$ -	\$ 592,311	\$ 2,011,025
Travel	173,798	8,300	83,041	-	101,538	366,677
Meeting expense	41,965	14	179,820	-	38,988	260,787
Consultant services	65,150	15,000	13,241	1,045	112,547	206,983
Facilities expense	68,670	51,068	20,935	-	207,113	347,786
Printing and duplication	11,321	1,908	55,799	-	53	69,081
Telephone and mail	8,390	15,546	13,939	2	20,966	58,843
Equipment expense	-	-	80	-	22,731	22,811
Administrative services	188,683	127,396	77,074	-	171,581	564,734
Provision for uncollectible state fees	-	-	-	-	993,149	993,149
Recovered costs	94,208	11,461	-	-	(105,669)	-
Total Expense Year Ended December 31, 2008	\$ 1,411,432	\$ 692,352	\$ 641,737	\$ 1,047	\$ 2,155,308	\$ 4,901,876



# Education Commission of the States

## 2008 Publications, Databases, Convenings

Title	Publication Date	Document Type
<i>High School Level Accountability</i> <a href="http://www.ecs.org/clearinghouse/79/59/7959.pdf">http://www.ecs.org/clearinghouse/79/59/7959.pdf</a>	December 2008	<i>StateNote</i>
<i>State P-16 and P-20 Council Considerations</i> <a href="http://www.ecs.org/clearinghouse/79/87/7987.pdf">http://www.ecs.org/clearinghouse/79/87/7987.pdf</a>	December 2008	<i>Tools and Resources</i>
<i>Strategies to Empower Low-Income and Minority Students in Gaining Admission to and Paying for College</i> <a href="http://www.ecs.org/clearinghouse/79/03/7903.pdf">http://www.ecs.org/clearinghouse/79/03/7903.pdf</a>	November 2008	<i>Policy Brief</i>
<i>A Growing Population: Hispanic Students in U.S. Schools and the Implications for American Education</i> <a href="http://www.ecs.org/clearinghouse/78/95/7895.pdf">http://www.ecs.org/clearinghouse/78/95/7895.pdf</a>	November 2008	<i>Progress of Education Reform</i>
<i>Ensuring Successful Student Transitions from the Middle Grades To High School</i> <a href="http://www.ecs.org/clearinghouse/78/91/7891.pdf">http://www.ecs.org/clearinghouse/78/91/7891.pdf</a>	November 2008	<i>Policy Brief</i>
<i>Landmines P-16/P-20 Councils Encounter — And How They Can Be Addressed (or Avoided Altogether)</i> <a href="http://www.ecs.org/clearinghouse/78/86/7886.pdf">http://www.ecs.org/clearinghouse/78/86/7886.pdf</a>	November 2008	<i>Policy Brief</i>
<i>Education-Related Ballot Questions: 2008</i> <a href="http://www.ecs.org/clearinghouse/70/71/7071.pdf">http://www.ecs.org/clearinghouse/70/71/7071.pdf</a>	November 2008	<i>StateNote</i>
<i>Improving the Skills and Knowledge of the High School Teachers We Already Have</i> <a href="http://www.ecs.org/clearinghouse/78/64/7864.pdf">http://www.ecs.org/clearinghouse/78/64/7864.pdf</a>	October 2008	<i>Policy Brief</i>
<i>Improving Outcomes for Traditionally Underserved Students Through Early College High Schools</i> <a href="http://www.ecs.org/clearinghouse/78/63/7863.pdf">http://www.ecs.org/clearinghouse/78/63/7863.pdf</a>	October 2008	<i>Policy Brief</i>
<i>High School Remediation</i> <a href="http://www.ecs.org/clearinghouse/78/61/7861.pdf">http://www.ecs.org/clearinghouse/78/61/7861.pdf</a>	October 2008	<i>Policy Brief</i>

<p><i>State Statutes Regarding Kindergarten: Policies Concerning District Offering of and Student Attendance in Full- and Half-Day Kindergarten Programs</i>  <a href="http://www.ecs.org/clearinghouse/78/60/7860.pdf">http://www.ecs.org/clearinghouse/78/60/7860.pdf</a></p>	October 2008	<i>StateNote</i>
<p><i>Service Learning Policies and Practice: A Research-Based Advocacy Paper</i>  <a href="http://www.ecs.org/clearinghouse/78/58/7858.pdf">http://www.ecs.org/clearinghouse/78/58/7858.pdf</a></p>	September 2008	<i>Issue Paper</i>
<p><i>Community College Success: Is It a Path to Opportunity?</i>  <a href="http://www.ecs.org/clearinghouse/78/57/7857.pdf">http://www.ecs.org/clearinghouse/78/57/7857.pdf</a></p>	September 2008	<i>Progress of Education Reform</i>
<p><i>Adolescent Literacy</i>  <a href="http://www.ecs.org/clearinghouse/78/51/7851.pdf">http://www.ecs.org/clearinghouse/78/51/7851.pdf</a></p>	September 2008	<i>StateNote</i>
<p><i>Virtual High Schools</i>  <a href="http://www.ecs.org/clearinghouse/78/50/7850.pdf">http://www.ecs.org/clearinghouse/78/50/7850.pdf</a></p>	September 2008	<i>StateNote</i>
<p><i>Strengthen Parents' Ability to Provide the Guidance and Support That Matter Most in High School</i>  <a href="http://www.ecs.org/clearinghouse/78/48/7848.pdf">http://www.ecs.org/clearinghouse/78/48/7848.pdf</a></p>	August 2008	<i>Policy Brief</i>
<p><i>Beyond the GED: State Strategies To Help Former Dropouts Earn a High School Diploma</i>  <a href="http://www.ecs.org/clearinghouse/78/47/7847.pdf">http://www.ecs.org/clearinghouse/78/47/7847.pdf</a></p>	August 2008	<i>Policy Brief</i>
<p><i>Dispelling the Myths About the Negative Effect of Raising High School Graduation Requirements</i>  <a href="http://www.ecs.org/clearinghouse/78/45/7845.pdf">http://www.ecs.org/clearinghouse/78/45/7845.pdf</a></p>	August 2008	<i>Policy Brief</i>
<p><i>The Progress of Education Reform — Secondary STEM Education</i>  <a href="http://www.ecs.org/clearinghouse/78/41/7841.pdf">http://www.ecs.org/clearinghouse/78/41/7841.pdf</a></p>	July 2008	<i>Progress of Education Reform</i>
<p><i>From Competing to Leading: AN INTERNATIONAL BENCHMARKING BLUEPRINT</i>  <a href="http://www.ecs.org/clearinghouse/79/84/7984.pdf">http://www.ecs.org/clearinghouse/79/84/7984.pdf</a></p>	July 2008	<i>Issue Paper</i>
<p><i>High School Agenda: Who's Doing What</i>  <a href="http://www.ecs.org/clearinghouse/78/26/7826.pdf">http://www.ecs.org/clearinghouse/78/26/7826.pdf</a></p>	June 2008	<i>Tools and Resources</i>
<p><i>The Progress of Education Reform: Counseling</i>  <a href="http://www.ecs.org/clearinghouse/78/25/7825.pdf">http://www.ecs.org/clearinghouse/78/25/7825.pdf</a></p>	June 2008	<i>Progress of Education Reform</i>
<p><i>Number of Instructional Days/Hours In the School Year</i>  <a href="http://www.ecs.org/clearinghouse/78/24/7824.pdf">http://www.ecs.org/clearinghouse/78/24/7824.pdf</a></p>	June 2008	<i>StateNote</i>
<p><i>State Policies on Youth Engagement In Policymaking</i>  <a href="http://www.ecs.org/clearinghouse/78/17/7817.pdf">http://www.ecs.org/clearinghouse/78/17/7817.pdf</a></p>	June 2008	<i>StateNote</i>

<i>State Funding Programs for High-Cost Special Education Students</i> <a href="http://www.ecs.org/clearinghouse/78/10/7810.pdf">http://www.ecs.org/clearinghouse/78/10/7810.pdf</a>	May 2008	<i>StateNote</i>
<i>School Uniforms and Dress Codes: State Policies</i> <a href="http://www.ecs.org/clearinghouse/77/97/7797.pdf">http://www.ecs.org/clearinghouse/77/97/7797.pdf</a>	May 2008	<i>StateNote</i>
<i>On A Razor's Edge: The National Economy and School Budgets</i> <a href="http://www.ecs.org/clearinghouse/77/90/7790.pdf">http://www.ecs.org/clearinghouse/77/90/7790.pdf</a>	April 2008	<i>Policy Brief</i>
<i>School Prayer, Moment of Silence, Other Policies Concerning Religion</i> <a href="http://www.ecs.org/clearinghouse/77/89/7789.pdf">http://www.ecs.org/clearinghouse/77/89/7789.pdf</a>	March 2008	<i>StateNote</i>
<i>The Progress of Education Reform: Developmental Education</i> <a href="http://www.ecs.org/clearinghouse/77/79/7779.pdf">http://www.ecs.org/clearinghouse/77/79/7779.pdf</a>	March 2008	<i>Progress of Education Reform</i>
<i>State Education Governance Models</i> <a href="http://www.ecs.org/clearinghouse/77/78/7778.pdf">http://www.ecs.org/clearinghouse/77/78/7778.pdf</a>	March 2008	<i>StateNote</i>
<i>Issues in Funding Early and Middle College High Schools</i> <a href="http://www.ecs.org/clearinghouse/77/72/7772.pdf">http://www.ecs.org/clearinghouse/77/72/7772.pdf</a>	March 2008	<i>StateNote</i>
<i>The Progress of Education Reform: Early Care and Education</i> <a href="http://www.ecs.org/clearinghouse/77/68/7768.pdf">http://www.ecs.org/clearinghouse/77/68/7768.pdf</a>	February 2008	<i>Progress of Education Reform</i>
<i>Cost Per-Day for Extended School Year</i> <a href="http://www.ecs.org/clearinghouse/77/67/7767.pdf">http://www.ecs.org/clearinghouse/77/67/7767.pdf</a>	February 2008	<i>StateNote</i>
<i>No Pass No Play</i> <a href="http://www.ecs.org/clearinghouse/77/66/7766.pdf">http://www.ecs.org/clearinghouse/77/66/7766.pdf</a>	February 2008	<i>StateNote</i>
<i>State Collective Bargaining Policies For Teachers</i> <a href="http://www.ecs.org/clearinghouse/77/27/7727.pdf">http://www.ecs.org/clearinghouse/77/27/7727.pdf</a>	January 2008	<i>StateNote</i>
<i>State Testing and Assessment Requirements for Initial and Continuing General Education Teachers</i> <a href="http://www.ecs.org/clearinghouse/77/13/7713.pdf">http://www.ecs.org/clearinghouse/77/13/7713.pdf</a>	January 2008	<i>StateNote</i>
<i>The Progress of Education Reform: Increasing Teacher Retention</i> <a href="http://www.ecs.org/clearinghouse/77/05/7705.pdf">http://www.ecs.org/clearinghouse/77/05/7705.pdf</a>	January 2008	<i>Progress of Education Reform</i>

## 50-State Databases

<i>Adolescent Literacy</i> <a href="http://www.ecs.org/hsdb-al">http://www.ecs.org/hsdb-al</a>	2008	<i>50-state database</i>
<i>Career &amp; Technical Education</i> <a href="http://www.ecs.org/hsdb-cte">http://www.ecs.org/hsdb-cte</a>	2008	<i>50-state database</i>
<i>Citizenship Education Database</i> <a href="http://www.ecs.org/citizenshipeducationdatabase">http://www.ecs.org/citizenshipeducationdatabase</a>	2008	<i>50-state database</i>
<i>Civics Assessment Database</i> <a href="http://www.ecs.org/qna">http://www.ecs.org/qna</a>	2008	<i>50-state database</i>
<i>Dual/Concurrent Enrollment</i> <a href="http://www.ecs.org/hsdb-de">http://www.ecs.org/hsdb-de</a>	2008	<i>50-state database</i>
<i>Early College/Middle Colleges</i> <a href="http://www.ecs.org/hsdb-echs">http://www.ecs.org/hsdb-echs</a>	2008	<i>50-state database</i>
<i>High School-Level Accountability</i> <a href="http://www.ecs.org/hsdb-hsa">http://www.ecs.org/hsdb-hsa</a>	2008	<i>50-state database</i>
<i>P-16/P-20 Councils</i> <a href="http://www.ecs.org/p-20">http://www.ecs.org/p-20</a>	2008	<i>50-state database</i>
<i>Postsecondary Feedback Systems</i> <a href="http://www.ecs.org/hsdb-pfs">http://www.ecs.org/hsdb-pfs</a>	2008	<i>50-state database</i>
<i>State Initiatives to Improve High School</i> <a href="http://www.ecs.org/hsdb-si">http://www.ecs.org/hsdb-si</a>	2008	<i>50-state database</i>
<i>STEM</i> <a href="http://www.ecs.org/hsdb-stem">http://www.ecs.org/hsdb-stem</a>	2008	<i>50-state database</i>
<i>Teacher Professional Development</i> <a href="http://mb2.ecs.org/reports/Reporttq.aspx?id=2068">http://mb2.ecs.org/reports/Reporttq.aspx?id=2068</a>	2008	<i>50-state database</i>
<i>Highlights of Local Initiatives</i> <a href="http://www.ecs.org/hsdb-li">http://www.ecs.org/hsdb-li</a>	2008	<i>Profiles Database</i>

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## Research Studies Database

2008

Database

*A Sampling of KEY EXTERNAL STUDIES SELECTED BY ECS FOR INCLUSION IN 2008*

*Instructional Leadership, Teaching Quality, and Student Achievement:  
Suggestive Evidence from Three Urban Districts*

[http://www.ecs.org/rs/Studies/DetailStudy.aspx?study\\_ID=117](http://www.ecs.org/rs/Studies/DetailStudy.aspx?study_ID=117)

*Half of College Students Needing Remediation Drop Out;  
Remediation Completers Do Almost as Well as Other Students*

[http://www.ecs.org/rs/Studies/DetailStudy.aspx?study\\_ID=116](http://www.ecs.org/rs/Studies/DetailStudy.aspx?study_ID=116)

*New Evidence on College Remediation*

[http://www.ecs.org/rs/Studies/DetailStudy.aspx?study\\_ID=106](http://www.ecs.org/rs/Studies/DetailStudy.aspx?study_ID=106)

*Addressing the Needs of Under-Prepared Students in Higher Education: Does College Remediation Work?*

[http://www.ecs.org/rs/Studies/DetailStudy.aspx?study\\_ID=112](http://www.ecs.org/rs/Studies/DetailStudy.aspx?study_ID=112)

*School-to-Career and Postsecondary Education: Evidence from the  
Philadelphia Educational Longitudinal Study (PELS)*

[http://www.ecs.org/rs/Studies/DetailStudy.aspx?study\\_ID=125](http://www.ecs.org/rs/Studies/DetailStudy.aspx?study_ID=125)

*School Turnarounds: A Review of the Cross-Sector Evidence on Dramatic Organizational Improvement*

[http://www.ecs.org/rs/Studies/DetailStudy.aspx?study\\_ID=105](http://www.ecs.org/rs/Studies/DetailStudy.aspx?study_ID=105)

*Extreme Degree of Difficulty: The Educational Demographics of Urban Neighborhood High Schools*

[http://www.ecs.org/rs/Studies/DetailStudy.aspx?study\\_ID=91](http://www.ecs.org/rs/Studies/DetailStudy.aspx?study_ID=91)

*Best Policies and Practices in Urban Educational Reform:*

*A Summary of Empirical Analysis Focusing on Student Achievement and Equity*

[http://www.ecs.org/rs/Studies/DetailStudy.aspx?study\\_ID=99](http://www.ecs.org/rs/Studies/DetailStudy.aspx?study_ID=99)

*Can Community Colleges Protect Both Access and Standards? The Problem of Remediation*

[http://www.ecs.org/rs/Studies/DetailStudy.aspx?study\\_ID=111](http://www.ecs.org/rs/Studies/DetailStudy.aspx?study_ID=111)

*Lights Just Click On Every Day*

[http://www.ecs.org/rs/Studies/DetailStudy.aspx?study\\_ID=115](http://www.ecs.org/rs/Studies/DetailStudy.aspx?study_ID=115)

*The Role of Districts in Fostering Instructional Improvement*

[http://www.ecs.org/rs/Studies/DetailStudy.aspx?study\\_ID=98](http://www.ecs.org/rs/Studies/DetailStudy.aspx?study_ID=98)

*Interpreting the Evidence on Life Cycle Skill Formation*

[http://www.ecs.org/rs/Studies/DetailStudy.aspx?study\\_ID=104](http://www.ecs.org/rs/Studies/DetailStudy.aspx?study_ID=104)

*Stepping Stones to a Degree: The Impact of Enrollment Pathways and Milestones  
on Community College Student Outcomes*

[http://www.ecs.org/rs/Studies/DetailStudy.aspx?study\\_ID=118](http://www.ecs.org/rs/Studies/DetailStudy.aspx?study_ID=118)

*School Structural Characteristics, Student Effort, Peer Associations, and Parental Involvement*

[http://www.ecs.org/rs/Studies/DetailStudy.aspx?study\\_ID=121](http://www.ecs.org/rs/Studies/DetailStudy.aspx?study_ID=121)

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## **ECS Meetings**

*National Forum on Education Policy*  
*Midwest/Heartland Regional Meeting*  
*Steering Committee Meeting*  
*Steering Committee Meeting*

July 2008  
December 2008  
Spring 2008  
Fall 2008

*National meeting*  
*Regional Meeting*  
*National meeting*  
*National meeting*